

# Multiple Award Schedules Desk Reference



# GSA Multiple Award Schedules

## GSA Multiple Award Schedules (MAS) Program Desk Reference

In your continuing role as a business advisor, we recognize that procurement is not just following rules and regulations. Rather, it is a process of making sound business decisions.

Today, we have new rules and operate in a different kind of environment. Your task now is to implement these new tools and develop efficient acquisition strategies. We have created this manual to assist you in your role.

## Tips at a Glance ...

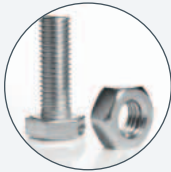
---

As you read through this manual, look for these helpful tips to help you make a “Best Value” selection.



### **POWER BUYING TIP**

These tips are identified by the icon to the left. Read them carefully; they create opportunities for cost savings.



### **NUTS AND BOLTS TIP**

These tips, identified by the icon shown here, are “how-to’s” designed to enhance your buying experience.

# Table of Contents

## Welcome.....4

Federal Acquisition Service (FAS) Value Statement...	4
GSA's Commitment to You.....	4
Buying Members of the GSA Schedules Program .....	4
Eligibility to Use GSA Sources of Supply and Services .....	5
List of Acronyms and Web Sites .....	6

## Section 1: Overview.....8

Understanding the GSA Schedules Program .....	8
Overview of the GSA Schedules Program .....	8
Priorities for Use of the Schedules Program .....	8
Services .....	8
Supplies .....	9
Competition and the GSA Schedules Program.....	9
Key Benefits of the GSA Schedules Program .....	9
Flexibility.....	10
Expert Knowledge.....	10
Money-Saving Options .....	10

## Section 2: How GSA Schedules are Awarded ..... 11

How the Schedules Program Works .....	11
Awarding a GSA Schedule Contract .....	11

## Section 3: Ordering Procedures..... 14

Ordering Procedures .....	14
Order Placement.....	17
Best Value.....	17
Ordering Activity – A Matter of Choice .....	19
Market Research – GSA Schedules .....	19
Limited Source Justification and Approval .....	20
Orders exceeding the micro-purchase threshold .....	20
Orders exceeding the simplified acquisition threshold.....	20
Justification Approvals .....	21
Notification of Award and Feedback to Unsuccessful Offerors.....	22
Contract Administration Functions.....	22
Options on Orders Placed Against Schedule Contracts and BPAs .....	22
Trade Agreements Act .....	23

## Section 4: DOD Ordering Procedures (Section 803)..... 24

DFARS 208.405-70 and GSA Multiple Award Schedules.....	24
GSA Schedule Orders for Services that Exceed \$100,000.....	24
When DFARS 208.405-70 Applies.....	24
DFARS 208.405-70 and GSA Schedule Blanket Purchase Agreements (BPAs) exceeding \$100,000 using DoD funds.....	24
Market Research is the Cornerstone.....	25
When Fewer than Three Responses are Received .....	25
Methods of Ordering from a GSA Schedule Contract .....	25

## Section 5: Responsibilities ..... 26

Past Performance.....	26
Additional Resources .....	27
Order Placement in the Case of a Contractor Debarred, Suspended, Proposed for Debarment.....	27

## Section 6: Making the Most of the GSA Schedules Program..... 28

Understanding Terms and Conditions .....	28
Standing Solicitations .....	28
Economic Price Adjustments (EPA) .....	28
Small Business .....	28
Environmental Identification.....	29
Price Reductions .....	30
Maximum Order.....	31
Performance Incentive.....	31
Worldwide Coverage, Expedited Delivery .....	32
Trade-ins .....	32
Governmentwide Commercial Purchase Card – GSA SmartPay®.....	32
Benefits of the GSA SmartPay® Program .....	33

## Section 7: Inspection/Acceptance and Terminations..... 34

Inspection and Acceptance .....	34
Termination for Cause .....	34
Nonconformance of Supplies/Services (Refer to FAR 8.406-3).....	34
FAR 8.406-4, Termination for Cause.....	35
Termination for the Government's Convenience.....	36

## Section 8: Request for Quote (RFQ) and Statement of Work (SOW) ..... 37

Understanding an SOW.....	37
Background .....	37
Objectives.....	38
Scope .....	38
Task or Requirements .....	38
Deliverables or Delivery Schedule .....	38
Government Furnished Equipment (GFE) and Government Furnished Information (GFI) .....	38
Security Provisions .....	39
Place of Performance.....	39
Period of Performance.....	39
RFQ.....	39
Evaluation/Selection Criteria.....	39
Open Market Items .....	40
Performance-Based Acquisitions (PBA).....	41
Use of Oral Presentations .....	41
Additional Resources .....	43

## Section 9: Schedule Blanket Purchase Agreements (BPAs) ..... 44

Benefits of a Schedule BPA .....	44
Setting up a GSA Schedule BPA .....	44
Single BPA .....	45
Multiple BPAs .....	46
Duration of Schedule BPAs .....	46
Review of Schedule BPAs .....	47
Setting up a Multi-Agency Schedule BPA .....	49
Obligation of Funds.....	50
Sample Schedule BPA.....	50
Using Options Under a Schedule BPA .....	50
Training.....	50



## Section 10: Contractor Team

<b>Arrangements (CTA) .....</b>	<b>51</b>
Benefits of CTAs .....	51
Invoicing .....	53
Problems/Issues.....	53
Fees/Charges .....	54
Pricing.....	54
Communication .....	54
Use of Subcontractors.....	54
Use of Blanket Purchase Agreements (BPAs) .....	54

## Section 11: eTools ..... 55

Center for Acquisition Excellence.....	55
Schedules eLibrary .....	55
GSA <i>Advantage!</i> ®.....	56
Security.....	57
Technical Problems.....	57
Order Status Questions.....	57
eBuy.....	57
How does eBuy work? .....	58
eOffer/eMod .....	58
Benefits.....	59
Customer Assistance .....	59

## Section 12: State and Local ..... 60

Cooperative Purchasing Program Overview.....	60
Disaster Recovery Purchasing (Section 833)	
Program Overview.....	60
Cooperative Purchasing and Disaster	
Recovery Purchasing Information .....	61
Program Use.....	61
Definitions.....	61
Payment by Credit Card .....	61
Ordering Procedures .....	61
Contract Formation .....	61
Payment .....	62
Disputes.....	62
1122 "Counterdrug" Program .....	62

## Section 13: GSA Schedule Listing ..... 63

Consolidated Schedule	
(formerly Corporate Contracts) .....	64
The Consolidated Schedule.....	64

## Section 14: Customer Assistance ..... 65

National Customer Service Center (NCSC).....	65
Multiple Award Schedule Help Desk .....	65
Problem Resolution.....	65
Centralized Mailing List Service (CMLS).....	65
Headquarters FAS Business Portfolio Contacts.....	66
Assisted Acquisition Services (AAS) .....	66
General Supplies and Services (GSS).....	66
Information Technology Services (ITS) .....	66
Travel, Motor Vehicle and Card Services (TMVCS) ...	66
Acquisition Centers .....	67
Center for Facilities Maintenance and Hardware	
(CFMH) .....	67
Greater Southwest Acquisition Center .....	67
IT Acquisition Center .....	68
Management Services Center (MSC).....	68
National Furniture Center.....	68
Office Supplies and Administrative Services Center	
(OSAS) .....	68
Center for Services Acquisition.....	69
Governmentwide Acquisition Contract	
(GWAC) Centers .....	69
Enterprise GWAC Center .....	69
Small Business GWAC Center .....	69

## Section 15: Additional GSA

### Acquisition Solutions..... 70

GSA Global Supply .....	70
Benefits of Ordering Through GSA Global Supply.....	70
After the Order.....	70
Catalogs.....	70
Governmentwide Acquisition Contracts (GWACs) ....	71
Network Services Programs .....	72

# Welcome ...

---

## ... to the **GSA Multiple Award Schedules (MAS) Desk Reference for Buying Solutions**

The General Services Administration (GSA) Multiple Award Schedules (also referred to as GSA Schedules and Federal Supply Schedules) program establishes long-term governmentwide contracts with commercial firms to provide access to more than 12 million commercial supplies and services that can be ordered directly from GSA Schedule contractors or through the *GSA Advantage!*® online shopping and ordering system.

GSA Schedules offer customers direct delivery of millions of state-of-the-art, high-quality commercial supplies and services at volume discount pricing. All customers, even those in remote locations, can conveniently order the latest technology and quality supplies and services, at most-favored customer prices. GSA Schedules also offer the potential benefits of shorter lead times, lower administrative costs and reduced inventories. When using GSA Schedules, ordering activities have the opportunity to meet small business goals while promoting compliance with various environmental and socioeconomic laws and regulations.

[www.gsa.gov/schedules](http://www.gsa.gov/schedules)

## **Federal Acquisition Service (FAS) Value Statement**

GSA is the only federal agency whose sole purpose is to help the government obtain the goods and services it needs. We at the GSA pledge to put customer service first and promise to provide innovative, best value solutions.

[www.gsa.gov/fas](http://www.gsa.gov/fas)

## **GSA's Commitment to You**

At the GSA, we have a continuous commitment to acquisition excellence. We provide policy leadership and expertly managed space, services, products and solutions at “Best Value” to enable federal employees to accomplish their missions.

[www.gsa.gov](http://www.gsa.gov)

# Buying Members of the GSA Schedules Program

---



Agencies and other activities are eligible to use GSA sources of services and supplies pursuant to the Federal Property and Administrative Services Act of 1949, or other statutory authority.

An eligible ordering activity is authorized to place orders or establish Blanket Purchase Agreements (BPAs) against GSA Schedule contracts. Refer to the list below of Eligible Activities.

Additional information on “Eligibility to Use GSA Sources” is located at

[www.gsa.gov/schedules](http://www.gsa.gov/schedules).



# Eligibility to Use GSA Sources of Supply and Services

Eligible Activities include:	Or:
An executive agency, including non-appropriated fund activities (41 CFR 101-26)	
A federal agency	A cost-reimbursable government contractor authorized in writing by a federal agency to use GSA Schedule contracts (refer to FAR Part 51).
A mixed-ownership government corporation	<p>A state and local government entity including any state, local, regional or tribal government or any instrumentality, including any local educational agency or institution of higher education authorized to place orders against Schedule 70 contracts and Special Item Numbers (SINs) for information technology (IT) services/products listed in the Consolidated Schedule contract.</p> <p><a href="http://www.gsa.gov/cooperativepurchasing">www.gsa.gov/cooperativepurchasing</a></p> <p>State and local governments can support their counterdrug efforts by purchasing equipment from GSA Schedule contractors. For more information, see <a href="http://www.gsa.gov/1122program">http://www.gsa.gov/1122program</a> and Section 12 of this document.</p> <p>Under Disaster Recovery Purchasing, state and local government entities may purchase a variety of products and services from contracts awarded under certain Schedules to facilitate recovery from a major disaster, terrorism, or nuclear, biological, chemical, or radiological attack. GSA Schedule contracts annotated with “Disaster Recovery” on <i>Schedules eLibrary</i> may be used by state and local governments to purchase products and services to preposition recovery from a major disaster as well as in the aftermath of an emergency event. For more information, see <a href="http://www.gsa.gov/disasterrecovery">http://www.gsa.gov/disasterrecovery</a> and Section 12 of this document.</p>
The District of Columbia	
A tribal government, when authorized under 25 U.S.C. 450j(k)	
An activity or organization authorized by statute or regulation to use GSA Schedule contracts as a source of supply	
A qualified nonprofit agency as authorized under 40 U.S.C. 502(b)	



# List of Acronyms and Web Sites

Below you'll find acronyms that appear in this manual. We have also included Web site addresses when available.

<b>AAC</b>	Activity Address Code
<b>AbilityOne</b>	Formerly known as JWOD <a href="http://www.abilityone.gov">www.abilityone.gov</a>
<b>ADR</b>	Alternative Dispute Resolution
<b>A/OPC</b>	Agency/Organization Program Coordinator
<b>BOA</b>	Basic Ordering Agreement
<b>BPA</b>	Blanket Purchase Agreement <a href="http://www.gsa.gov/bpa">www.gsa.gov/bpa</a>
<b>Center for Acquisition Excellence</b>	Center for Acquisition Excellence <a href="http://www.gsa.gov/centerforacquisitionexcellence">www.gsa.gov/centerforacquisitionexcellence</a>
<b>CICA</b>	Competition in Contracting Act
<b>CCR</b>	Central Contractor Registration <a href="http://www.ccr.gov">www.ccr.gov</a>
<b>CMLS</b>	Centralized Mailing List Service <a href="http://www.gsa.gov/cmls">www.gsa.gov/cmls</a>
<b>COC</b>	Certificate of Competency
<b>CTA</b>	Contractor Teaming Arrangement
<b>eBuy</b>	Electronic Request for Quotes System <a href="http://www.gsa.gov/ebuy">www.gsa.gov/ebuy</a>
<b>EPA</b>	Economic Price Adjustment
<b>EPLS</b>	Excluded Parties List System <a href="http://www.epls.gov">www.epls.gov</a>
<b>FAR</b>	Federal Acquisition Regulation <a href="http://www.acqnet.gov/far/index.html">www.acqnet.gov/far/index.html</a>
<b>FAS</b>	Federal Acquisition Service <a href="http://www.gsa.gov/fas">www.gsa.gov/fas</a>
<b>FedBizOpps</b>	Federal Business Opportunities <a href="http://www.fedbizopps.gov">www.fedbizopps.gov</a>
<b>FPMR</b>	Federal Property Management Regulations
<b>GFE</b>	Government Furnished Equipment
<b>GFI</b>	Government Furnished Information
<b>GFM</b>	Government Furnished Material
<b>GPE</b>	Governmentwide Point-of-Entry Federal Business Opportunities <a href="http://www.fedbizopps.gov">www.fedbizopps.gov</a>
<b>GSA</b>	General Services Administration <a href="http://www.gsa.gov">www.gsa.gov</a>
<b>GSAM</b>	General Services Administration Acquisition Manual <a href="http://www.acquisition.gov/gsam">www.acquisition.gov/gsam</a>

<b>GWAC</b>	Governmentwide Acquisition Contract <a href="http://www.gsa.gov/gwac">www.gsa.gov/gwac</a>
<b>HUBZone</b>	Historically Underutilized Business Zone
<b>IDIQ</b>	Indefinite Delivery/Indefinite Quantity
<b>MFC</b>	Most Favored Customer
<b>MAS</b>	Multiple Award Schedule
<b>MOU</b>	Memorandum of Understanding
<b>NCSC</b>	National Customer Service Center
<b>OMB</b>	Office of Management and Budget <a href="http://www.whitehouse.gov/omb">www.whitehouse.gov/omb</a>
<b>PBA</b>	Performance-Based Acquisition
<b>PL</b>	Public Law
<b>PPIRS</b>	Past Performance Information Retrieval System <a href="http://www.ppirs.gov">www.ppirs.gov</a>
<b>PWS</b>	Performance Work Statement
<b>QASP</b>	Quality Assurance Surveillance Plan
<b>RFI</b>	Request for Information
<b>RFQ</b>	Request for Quotation
<b>SBA</b>	Small Business Administration <a href="http://www.sba.gov">www.sba.gov</a>
<b>SIN</b>	Special Item Number
<b>SOO</b>	Statement of Objectives
<b>SOW</b>	Statement of Work
<b>SPOC</b>	State Point of Contact
<b>U.S.C.</b>	United States Code

# Section 1: Overview

---

## Understanding the GSA Schedules Program

The General Services Administration (GSA) is a centralized federal procurement and property management agency designed to help federal agencies serve the public. GSA continuously seeks new services and supplies, designs fresh systems, introduces procurement models, addresses customer needs and expectations, and strives to create “Best Value” for customers.

## Overview of the GSA Schedules Program

This Schedules program provides eligible federal agencies and state/local entities with a simplified process for obtaining services and supplies.

Simply put, a Schedule is a listing of companies that supply comparable commercial services and supplies through contracts awarded by the GSA. With numerous Schedules in place, the program offers tremendous choices.

Schedule contracts are indefinite delivery/indefinite quantity (IDIQ) contracts awarded to responsible companies that offer commercial services or supplies at fair and reasonable prices. These contracts can be used by eligible ordering activities worldwide (refer to “Eligibility to Use GSA Sources of Supply and Services” on Page 5). After GSA awards the contracts, ordering activities order from Schedule contractors and deliveries are made directly to the customer.

## Priorities for Use of the GSA Schedules Program



FAR 8.002 establishes priorities for the use of government supply and service sources to satisfy ordering activity requirements. For more information, visit the online version of the FAR at [www.acqnet.gov/far/index.html](http://www.acqnet.gov/far/index.html).

## Services

For services, in descending order, the priority for use is:



- ❖ Services that are on the Procurement List maintained by the Committee for Purchase from People Who Are Blind or Severely Disabled (refer to FAR 8.7)
- ❖ Mandatory Federal Supply Schedules (refer to FAR 8.4)
- ❖ Optional Use Federal Supply Schedules (refer to FAR 8.4)
- ❖ Federal Prison Industries, Inc. (refer to FAR 8.6) or commercial sources (including educational and nonprofit institutions)

## Supplies

For supplies, in descending order, the priority for use is:

- ❖ Agency inventories
- ❖ Excess from other agencies (refer to FAR 8.1)
- ❖ Federal Prison Industries, Inc. (refer to FAR 8.6)
- ❖ Supplies on the Procurement List maintained by the Committee for Purchase from People Who Are Blind or Severely Disabled (refer to FAR 8.7)
- ❖ Wholesale supply sources, such as stock programs of GSA (refer to 41 CFR 101-26.3), the Defense Logistics Agency (refer to 41 CFR 101-26.6), the Department of Veterans Affairs (refer to 41 CFR 101-26.704), and military inventory-control points
- ❖ Mandatory Federal Supply Schedules (refer to FAR 8.4)
- ❖ Optional use Federal Supply Schedules (refer to FAR 8.4)
- ❖ Commercial sources (including educational and nonprofit institutions)

## Competition and the GSA Schedules Program

The FAR states that orders and BPAs placed against the Schedules program are considered to be issued pursuant to full and open competition. The Schedules program meets the requirements of the Competition in Contracting Act (CICA). Reference 41 United States Code 259(b)(3)(A) and FAR 6.102(d)(3). An acquisition is considered in accordance with the use of competitive procedures when ordering agencies follow the ordering procedures of FAR 8.4 Federal Supply Schedules (refer to “Ordering Procedures” on Page 14).

Therefore, when placing orders in accordance with FAR 8.404(a), ordering activities:

- ❖ Need not seek further competition outside the Schedules program.
- ❖ Shall not synopsise the requirement in FedBizOpps.
- ❖ Need not make a separate determination of fair and reasonable pricing, except for the price evaluation required by FAR 8.405-2(d).

## Key Benefits of the GSA Schedules Program

The wide variety and large number of Schedule contractors allow ordering activities to access an extensive range of services and supplies to satisfy their requirements. More than 17,000 Schedule contractors offer 11 million services and supplies.

Additionally, the Schedules program offers ordering activities numerous benefits, including:

## Flexibility

When placing orders against the Schedules, an ordering activity does not need to order the lowest-priced services/supplies. Instead, ordering activities make a best value determination to select services or supplies to meet their needs (to find more on “Best Value” refer to Page 17).

Schedule users have the flexibility to access the latest technology, because Schedule contractors may submit requests at any time to add services or supplies. Contractors must also delete, by contract modification action, services and supplies that they no longer offer commercially.

## Expert Knowledge

GSA forms partnerships with industry experts — from small, innovative companies to Fortune 500 firms — that understand the services and supplies needed by Schedules program customers. Similarly, GSA works with ordering activities to understand their needs. These efforts bring the private sector and ordering activities together in the knowledge supply chain.

## Money-Saving Options

### ❖ Volume Pricing

GSA negotiates competitive contracts with commercial partners that offer discounts equal to or better than those provided to their best commercial customers.

### ❖ Spot Discounts

Schedule contractors may lower contract prices, offer spot discounts, pass along long-term price reductions and/or provide additional concessions.

### ❖ Price Reductions

Seeking additional price reductions and concessions allows the customer to achieve improved prices and delivery terms.



### NUTS AND BOLTS TIP

The Economy Act FAR 17.500 (b)(1) does not apply to the GSA Schedules program. No memorandum of understanding (MOU) is required for an agency to use a Schedules contract.





## Section 2: How GSA Schedules are Awarded

---

### How the GSA Schedules Program Works

The Schedules program provides commercial acquisitions. Through the program, GSA offers a means for you to take advantage of the tremendous benefits that can be achieved only by leveraging the government's immense buying power. The discounts this buying power affords are passed on to ordering activities.

The steps GSA takes in the acquisition process to establish Schedule contracts are similar to those of any federal acquisition. A step-by-step approach is provided below to explain this process.

### Awarding a GSA Schedule Contract

#### Step 1. Acquisition Planning

New Schedules are often created in response to requests from federal customers. Likewise, GSA may create a Schedule after examining emerging commercial and government trends.

GSA conducts market research and electronically posts pre-solicitation notices and synopses. Also, pre-solicitation conferences are held with industry and eligible ordering activities to assist GSA in accurately identifying and describing potential future requirements. Additionally, for each Schedule solicitation, small business set-aside determinations are made.



#### NUTS AND BOLTS TIP

The set-aside requirements of Part 19 apply at the acquisition planning stage prior to the GSA Schedule solicitations and do NOT apply to the orders and BPAs placed against resulting Schedule contracts (refer to FAR 38.101(e)).

#### Step 2. Standing Solicitations and Offers

Standing solicitations are posted on FedBizOpps ([www.fedbizopps.gov](http://www.fedbizopps.gov)), and offers are solicited and accepted from prospective businesses at any time. Solicitations are continuously refreshed and updated as contract terms and conditions evolve.

#### Step 3. Evaluation

After offers are received, each individual offer is evaluated on its own merit. Offerors are provided opportunities to clarify deficiencies and are allowed to submit supplemental information.

During the evaluation process, contracting office personnel work closely with the small business technical advisor to evaluate small business subcontracting goals for large business offerors.

Prior to award, a responsibility determination is made that may include the following:

- ❖ Past Performance Report
- ❖ Past Performance Information Retrieval System
- ❖ Open Ratings
- ❖ Excluded Parties List System (EPLS)
- ❖ Financial Capability Assessment



Because the GSA has already done the responsibility determination at the Schedules contract level, ordering agencies are not required to conduct a FAR 9.104 responsibility determination for their Schedule orders. A determination of responsibility focuses on a Schedule contractor's financial resources, integrity, operational controls, technical skills, production control procedures, quality assurance measures, property control systems, technical equipment, facilities and past performance (refer to FAR 9.104) at [www.acqnet.gov/far/index.html](http://www.acqnet.gov/far/index.html). Other requirements and clearances can include:

- ❖ EEO clearance (refer to FAR 22.805)
- ❖ Pre-Award Audit (refer to FAR 15.404-2(a))
- ❖ Central Contractor Registration (CCR)

GSA evaluates the Schedule offerings in accordance with procedures in FAR Part 12 and the General Services Administration Acquisition Manual (GSAM). Prior to the award of a Schedule contract, the GSA Contracting Officer confirms that the prices of fixed-price services, supplies and hourly rates for services are fair and reasonable. The prices or discounts offered to GSA are compared with the prices or discounts offered by the company to its own commercial customers.

In addition, the offeror's discount practices are examined, evaluated and used to identify the offeror's "most favored customer" (MFC) pricing. A price analysis is then performed and negotiation strategies developed based on historical data, sales information provided and other market-research techniques.

**NOTE:** *Contracts awarded under the GSA Schedules program are in compliance with Public Law (P.L.) 95-507, Section 211, Subcontracting: Agency Coordination with the Small Business Administration Resident Procurement Center Representatives.*



### NUTS AND BOLTS TIP

Ordering Agencies do *NOT* need to have subcontracting plans reviewed at the Task order level.

Prospective offerors — representing themselves as large firms and whose anticipated contract value (including option periods) is \$550,000 or more — must submit a subcontracting plan that identifies percentage goals for subcontracts with small business firms and describes how the planned goals will be achieved. In turn, GSA reviews, negotiates

and approves the proposed subcontracting goals. Based upon subcontracting plans, agreed percentages enable federal government business to “flow down” to small business concerns. The GSA Contracting Officer complies with the EEO clearance procedures of FAR 22.8005. As a result, a separate EEO clearance is not required at the order level.

#### Step 4. Negotiations

At the conclusion of contract negotiations, the prospective Schedule contractor submits final proposal revisions. Upon receipt, the Contracting Officer will either reject unacceptable offers or determine that prices are fair and reasonable.

When the offeror is a small business concern and a non-responsibility determination has been made, a Certificate of Competency (COC) is requested from the Small Business Administration (SBA). SBA is authorized by Congress to certify a small company's “capability, competency, credit, integrity, perseverance and tenacity” for performing a specific government contract (refer to FAR 19.6).

#### Step 5. Contract Award

Award is made to acceptable offerors considering price and other factors.



##### NUTS AND BOLTS TIP

Most GSA Schedule contracts have a base period of five years, with the potential opportunity of three additional five-year option periods. Options are exercised in accordance with FAR 17.207.

#### Step 6. Award Notification

Schedule contract award notification includes pricing and the terms and conditions of the contract (to access contracts online, visit the Schedules eLibrary at [www.gsa.gov/elibrary](http://www.gsa.gov/elibrary)).

#### Step 7. Distribution of Award Information

GSA posts various contract award information on Schedules eLibrary at [www.gsa.gov/elibrary](http://www.gsa.gov/elibrary). Contract-award pricing information is available online at GSA Advantage!® at [www.gsaadvantage.gov](http://www.gsaadvantage.gov) (refer to “eTools” on Page 55).



##### NUTS AND BOLTS TIP

Schedule contractors are required to publish an “Authorized Federal Supply Schedule Pricelist” to provide to ordering activities upon request. The pricelist contains all services and supplies offered by the Schedule contractor as well as the terms and conditions pertaining to each Special Item Number (SIN) for the Schedule contract.

Schedule contractors are required to provide one copy of their price list to any ordering activity upon request. A copy of a price list may also be obtained from GSA by submitting an e-mail request to [schedules.infocenter@gsa.gov](mailto:schedules.infocenter@gsa.gov) or by calling (800) 488-3111.



## Section 3: Ordering Procedures

### Ordering Procedures

“Ordering activity” signifies an activity that is authorized to place orders or establish Blanket Purchase Agreements (BPA) against the GSA Multiple Award Schedule contracts.

GSA has streamlined ordering procedures, allowing an ordering activity to direct its focus on the requirement rather than on a lengthy acquisition process. The FAR provides the primary regulatory guidance for the GSA Schedules program. FAR 8.4, Federal Supply Schedules prescribes procedures that ordering activities must follow when issuing orders using Schedules. By placing an order against a Schedule contract using the procedures in FAR 8.405, the ordering activity has concluded that the order represents the best value (as defined in FAR 2.101, Definitions) and results in the lowest overall cost alternative to meet the government’s need. Although GSA has already negotiated fair and reasonable pricing, ordering activities may and are encouraged to seek additional discounts before placing an order (refer to FAR 8.405-4).

**Note:** *Ordering Agencies shall seek price reductions for (1) orders over the MOT and (2) for Schedule BPAs regardless of dollar value. FAR 8.405-2(c)(3)(ii).*



For a list of eligible ordering activities, refer to “Eligibility to Use GSA Sources of Supply and Services” on Page 5. Additional information on “Eligibility to Use GSA Sources” is located at [www.gsa.gov/schedules](http://www.gsa.gov/schedules).



#### NUTS AND BOLTS TIP

When agency requirements are to be satisfied using the Schedules, FAR Parts 13, Simplified Acquisition Procedures (except 13.303-2(c)(3)); Parts 14, Sealed Bidding; Parts 15, Contracting by Negotiation and Parts 19, Small Business Programs (except 19.202-1(e)(1)(iii)) do not apply.

The ordering procedures were established by GSA in accordance with FAR 8.4, Federal Supply Schedules. Orders placed against a Schedule contract:

- ❖ Are not exempt from the development of acquisition plans (refer to FAR 7.1)
- ❖ Are not exempt from an information technology acquisition strategy (refer to FAR 39)
- ❖ Are not exempt from the requirements for a bundled contract when the order meets the definition of “bundled contract” (refer to FAR 2.101)



#### POWER BUYING TIP

Services and supplies may be combined on a single task or delivery order.



## DOD BUYER TIP

DOD buyers and other activities using DOD funds should remember that for orders over \$100,000, the policies and procedures in DFARS 208.405-70 take precedence — for more information refer to Page 24.

**Note:** The information contained in the table below is not all-inclusive. For more information, refer to FAR 8.404 and 8.405.

Ordering Procedures	
Services and products; where no SOW is required.	Services that require an SOW (when ordering services priced at hourly rates).
<b>Orders at or below the micro-purchase threshold:</b>  Place the order directly with any GSA Schedule contractor that can meet the ordering activity's needs.	<b>Orders at or below the micro-purchase threshold:</b>  Place the order directly with any GSA Schedule contractor that can meet the ordering activity's needs.
<b>Orders that exceed the micro-purchase threshold, but not the maximum order threshold:</b>  Consider reasonably available information about the supply or service offered on the GSA Advantage!® online shopping service, or survey at least three GSA Schedule contractors' price list.  Evaluate, then make a "Best Value" determination (refer to Page 17).	<b>Orders that exceed the micro-purchase threshold but not the maximum order threshold:</b>  Prepare an SOW or PBSOW in accordance with FAR 8.405-2(b).  ❖ Send the RFQ (including the SOW and evaluation criteria) to at least three GSA Schedule contractors  <b>Note:</b> The ordering activity should request GSA Schedule contractors to submit firm-fixed prices to perform the services identified in the SOW.  Evaluate, then make a "Best Value" determination (refer to Page 17).

Ordering Procedures	
<p><b>Orders that exceed the maximum order threshold or when establishing a BPA:</b></p> <p>Follow the same procedures for orders that exceed the micro-purchase threshold and review additional pricelists or use “GSA Advantage!”® online shopping service. Evaluate, seek price reductions from GSA Schedule contractor(s) considered to offer the best value. After seeking price reductions (refer to FAR 8.405-4), place the order with the GSA Schedule contractor that provides the best value.</p>	<p><b>Orders that exceed the maximum order threshold or when establishing a BPA:</b></p> <p>Follow the same procedures for orders that exceed the micro-purchase threshold. Refer to FAR 8.405-2 (c)(2) and send the RFQ (including the SOW and evaluation criteria) to additional GSA Schedule contractors.</p> <p><b>Note:</b> <i>The appropriate number of additional GSA Schedule contractors will depend on the complexity, scope and estimated value of the requirement.</i></p> <p>Seek price reductions. Evaluate all responses and place the order, or establish the BPA with the GSA Schedule contractor that represents the best value (refer to FAR 8.405-2(d)).</p>
Documentation	
<p>The ordering activity <i>must, at a minimum</i>, include the following documentation: name of the GSA Schedule contractor from which the service or supply was purchased; a description of the service or supply, the purchase price; if applicable, the circumstances and rationale for restricting consideration of GSA Schedule contractors to fewer than required (refer to FAR 8.405-1).</p> <p><b>Note:</b> <i>Additional documentation is necessary when the requirement is for a particular brand name*, product or a feature of a product peculiar to one manufacturer. The ordering activity shall include an explanation in the file as to why the particular brand name, product or feature is essential to satisfy the ordering activity's needs.</i></p>	<p>In addition to the information shown on the left side of this table, when acquiring services using the procedures at FAR 8.405-2, the ordering activity must also document: evaluation methodology used; trade-off rationale; price reasonableness (refer to FAR 8-405-2 (b)).</p> <p>Rationale for other than Firm Fixed Price order or performance-based order:</p> <p><b>Note:</b> <i>If other than a Firm Fixed Priced order is placed, include the basis for the determination to use a labor hour or time-and-materials order.</i></p> <p>For ordering activity requirements that exceed the micro-purchase threshold, document the evaluation of the GSA Schedule contractors' quotations that formed the basis for the selection of the contractor receiving the order. Document the rationale for any trade-offs made in the selection.</p>
<p>* <b>NOTE:</b> For brand name or equivalent, refer to “For Customers – Ordering from Schedules, Use of Brand Name Specifications” located at <a href="http://www.gsa.gov/schedules">www.gsa.gov/schedules</a>.</p>	



## Order Placement

Ordering agencies may place orders orally (except for services requiring an SOW) or use an established electronic communications format to order services or supplies from GSA Schedule contracts (refer to FAR 8.406-1).

Prior to the placement of an order, the ordering activity must ensure that the regulatory and statutory requirements of the requiring agency have been applied. Orders must include the following information in addition to any information required by the Schedule contract:

- ❖ Complete shipping and billing addresses
- ❖ Contract number, agency order number and date
- ❖ F.O.B. delivery points: e.g., origin or destination
- ❖ Discount terms
- ❖ Delivery time or period of performance
- ❖ SIN or national stock number (NSN)
- ❖ SOW, when required, or brief, complete description of each item

(Ordering by model number, features and options such as color, finish and electrical characteristics, if available, must be specified.)

- ❖ Quantity
- ❖ Number of units
- ❖ Unit price
- ❖ Total price of order
- ❖ Points of inspection and acceptance
- ❖ Other pertinent data: e.g., delivery instructions or receiving hours and size-of-truck limitation
- ❖ Marking requirements
- ❖ Level of preservation, packaging and packing

## Best Value

Ordering activities have considerable latitude in structuring their procurement and can consider both price and other factors (e.g., past performance, technical capabilities and qualifications of key personnel) in selecting Schedule contractors. When determining “Best Value,” ordering an activity may use a combination of one or more of the following approaches, such as lowest-priced technically acceptable and/or trade-off processes.

When determining which non-price evaluation factors to include in a RFQ, ordering activities should consider factors other than price, such as:

- ❖ Identify what factors will be considered and select factors that affect service or supply value

- ❖ Determine how factors will be considered and their relative importance to other non-price factors and the possible trade-offs involved
- ❖ Consider the differences between Schedule contractors

**Factors that may be considered in determining “Best Value” are listed below. The list is not exhaustive and other factors may also be included.**

1. Special features of the service or supply required for effective program performance
2. Past performance records
3. Quality of proposed solutions and cost differences
4. Trade-in considerations
5. Probable life of the item selected
6. Warranty considerations
7. Maintenance availability
8. Environmental and energy efficiency considerations
9. Delivery terms
10. Expertise of the offeror
11. Socio-economic status

The benefits of making a “Best Value” selection decision can result in improved mission performance and lower life-cycle costs, while encouraging Schedule contractors to provide their best services and supplies to the government.

The fundamental goal of GSA in managing the Schedules program is to provide an array of acquisition choices that provides sufficient flexibility to satisfy customers in terms of choice, price, quality and timeliness of delivery.



## **NUTS AND BOLTS TIP**

### **Competition**

If the response to any of the following questions is “yes,” competition may be unnecessarily limited.

1. Is the SOW narrowly defined with overly restrictive specifications or performance standards?
2. Is the order written in such a way as to create a continuous arrangement with the same contractor?
3. Was the requirement obtained through the use of restricted competition not in accordance with the procedures in FAR 8.405-6?
4. Is it a brand name or equivalent? Refer to “For Customers – Ordering from Schedules, Use of Brand Name Specifications” located at [www.gsa.gov/schedules](http://www.gsa.gov/schedules).

## Ordering Activity – A Matter of Choice

Ordering activities have the primary responsibility to meet their agency missions. By using Schedules, ordering activities may access a wide variety of contractors. Ordering activities may place orders in a competitive environment to contractors offering the best value.

Ordering activities are encouraged to explore and understand the features available under the Schedules program and to use them to optimize their purchasing experience (refer to “Making the Most of the GSA Schedules Program” on Page 28). As with any purchase, the ordering activity is responsible for applying the regulatory and statutory requirements for which the order is placed or the BPA is established. The requiring agency shall provide the information on the applicable regulatory and statutory requirements to the contracting officer responsible for placing the order.

Finally, performance-based acquisitions, in which requirements are stated in an objective and clear manner, allow an ordering activity to be results oriented. The PWS or SOO states what is to be accomplished and allows Schedule contractors to propose various solutions to accomplish the objective.

The emphasis is then placed on the selection process “Best Value.” For example, by selecting Schedule contractors interested in continuous improvement, the motivation to reduce costs exists and allows a reduction in price to follow. When ordering activities state the results requested, Schedule contractors are better able to offer more creative, cost-effective solutions.

## Market Research – GSA Schedules

Market research is defined as collecting and analyzing information on the market for a government requirement (refer to FAR 2.101). It is an essential element in acquiring commercial items and provides information to the ordering activity in understanding the requirement and what is available in the commercial marketplace.

Acquisitions begin with a description of the ordering activity's needs, stated in terms sufficient to conduct market research. The type, extent and use of market research is determined by the availability of a commercial service or supply, the complexity of the order, its nature (whether the order is to fulfill a new or recurring requirement, an enhancement, etc.), the dollar value of the order, and the industry sector involved (refer to FAR 10.002). Both the ordering Contracting Officer and requiring activity are responsible for market research.

To perform effective market research, the ordering activity must collect and analyze information about the capabilities within the market to satisfy the agency's need. The results of market research will determine if Schedule contracts have items available to meet an ordering activity's needs. At the same time, market research will also indicate whether commercial sources exist that are capable of satisfying the activity's requirement, as well as the customary commercial terms and conditions; e.g., practices of firms engaged in producing, distributing and supporting commercial items in terms of warranty, buyer financing, maintenance and packaging and the market environment.

Other factors ordering activities will want to include during market research are performance standards, industry trends, price, delivery times, payment methods, trade-offs, quality control methods, surveillance methods, etc.

Using GSA *Advantage!*<sup>®</sup> ([www.gsaadvantage.gov](http://www.gsaadvantage.gov)), ordering activities may perform market research, review the terms and conditions of capable Schedule contractors and perform price comparisons. Refer to Section 11, eTools.



Market Research may be facilitated through the use of eBay to distribute an RFI to Schedule contractors. Using an RFI via eBay may produce valuable feedback from potential Schedule vendors on how to best to tailor the acquisition and how to best utilize Schedule sources.

## Limited Source Justification and Approval

Procurement of limited source requirements under Schedules must be justified in writing and approved at the required levels (refer to FAR 8.405-6).

Orders placed under Schedules are exempt from the requirements in Part 6. An ordering activity must justify its actions when (1) restricting consideration of Schedule contractors to fewer than the number required by 8.405-1 or 8.405-2, or, (2) restricting consideration to a brand name item peculiar to one manufacturer.

When an ordering activity restricts consideration of Schedule contractors to fewer than that required in 8.405-1 or 8.405-2, the ordering activity shall procure such requirements under this subpart only if the need to do so is justified in writing and approved at the levels specified in paragraphs “(f)” and “(h)” of FAR 8.505-6.



## Orders exceeding the micro-purchase threshold, but not exceeding the simplified acquisition threshold as defined in FAR 2.101.

For proposed orders exceeding the micro-purchase threshold, but not exceeding the simplified acquisition threshold, the ordering activity contracting officer shall document the circumstances when restricting consideration of Schedule contractors to fewer than required in FAR 8.405-1 or 8.405-2.

## Orders exceeding the simplified acquisition threshold.

- ❖ For proposed orders exceeding the simplified acquisition threshold, the requiring activity shall assist the ordering activity contracting officer in the preparation of the justification. The justification shall cite that the acquisition is conducted under the authority of the GSA Multiple Award Schedules program (refer to FAR 8.401).
- ❖ As a minimum, each justification shall include the following information:
  - ❖ Identification of the agency and the contracting activity, and specific identification of the document as a “Limited Source Justification.”
  - ❖ Nature and/or description of the action being approved.
  - ❖ A description of the supplies or services required to meet the agency’s needs (including the estimated value).
  - ❖ Identification of the justification rationale (refer to FAR 8.405-6(b)) and, if applicable, a demonstration of the proposed contractor’s unique qualifications to provide the required supply or service.
  - ❖ A determination by the ordering activity contracting officer that the order represents the best value consistent with FAR 8.404(d).



## NUTS AND BOLTS TIP

Circumstances that may justify restriction include:

- ❖ Only one source is capable of responding due to the unique or specialized nature of the work.
- ❖ The new work is a logical continuation of an original Schedule order, provided that the original order was placed in accordance with the applicable Schedule ordering procedures. The original order must not have been previously issued under sole source or limited source procedures.
- ❖ An urgent and compelling need exists, and following the ordering procedures would result in unacceptable delays.

- ❖ A description of the market research conducted among Schedule holders and the results or a statement of the reason market research was not conducted.
- ❖ Any other facts supporting the justification.
- ❖ A statement of the actions, if any, the agency may take to remove or overcome any barriers that led to the restricted consideration before any subsequent acquisition for the supplies or services is made.
- ❖ The ordering activity contracting officer's certification that the justification is accurate and complete to the best of the contracting officer's knowledge and belief.
- ❖ Evidence that any supporting data that is the responsibility of technical or requirements personnel (e.g., verifying the government's minimum needs or requirements or other rationale for limited sources) and which form a basis for the justification have been certified as complete and accurate by the technical or requirements personnel.

## Justification Approvals

- ❖ For proposed orders exceeding the simplified acquisition threshold, but not exceeding \$550,000, the ordering activity contracting officer's certification that the justification is accurate and complete to the best of the ordering activity contracting officer's knowledge and belief will serve as approval, unless a higher approval level is established in accordance with agency procedures.
- ❖ For a proposed order exceeding \$550,000, but not exceeding \$11.5 million, the justification must be approved by the competition advocate of the activity placing the order, or by an official named in paragraph (h)(3) or (h)(4) of FAR 8.405-6. This authority is not delegable.

- ❖ For a proposed order exceeding \$11.5 million, but not exceeding \$57 million (or, for DoD, NASA, and the Coast Guard, not exceeding \$78.5 million), the justification must be approved by the head of the procuring activity placing the order, or a designee who, if a member of the armed forces, is a general or flag officer, or if a civilian, is serving in a position in a grade above GS-15 under the General Schedule (or in a comparable or higher position under another Schedule); or an official named in paragraph (h)(4) of FAR 8.405-6.
- ❖ For a proposed order exceeding \$57 million (or, for DoD, NASA and the Coast Guard, over \$78.5 million), the justification must be approved by the senior procurement executive of the agency placing the order. This authority is not delegable, except in the case of the Under Secretary of Defense for Acquisition, Technology and Logistics, acting as the senior procurement executive for the Department of Defense.

### **Notification of Award and Feedback to Unsuccessful Offerors**



After award, when using the ordering procedures for services requiring an SOW, the ordering activity shall provide timely notification to unsuccessful offerors. If an unsuccessful offeror requests information on an award that was based on factors other than price alone, a brief explanation of the basis for the award decision must be provided (refer to FAR 8.405-2(d)).

### **Contract Administration Functions**



Contract administration focuses on obtaining quality services and supplies on time and within budget. Contract administration involves actions performed by ordering activities after an order has been placed, to ensure the Schedule contractor performs in accordance with the order requirements and complies with the terms and conditions of the Schedule contract.



### **Options on Orders Placed Against Schedule Contracts and BPAs**

Options may be included on orders placed against Schedule contracts, if the options are clearly stated in the requirement and are evaluated as part of the ordering activity's "Best Value" determination. Such options may be exercised on Schedule contract orders, provided that:

- ❖ Funds are available
- ❖ The requirement covered by the option fulfills an existing government need
- ❖ Prior to exercising an option, the ordering activity ensures that it is still in the government's best interest, with price and other factors considered
- ❖ The options do not extend beyond the period of the Schedule contract, including option year periods

Under the preceding conditions, Blanket Purchase Agreements (BPAs) under Schedule contracts may be established with options that extend beyond the end of the basic Schedule contract period. The length of the order and the risk to the ordering activity could be considered as part of the overall evaluation of best value.



## Trade Agreements Act

The current threshold for the applicability of the Trade Agreements Act (for a supply or service contract) is \$193,000. The U.S. Trade Representative revises this threshold approximately every two years (refer to FAR 25.402(b)). GSA applies the threshold on a Schedule-wide basis, and therefore the Trade Agreements Act applies to all Schedule contracts. All Schedule products and services must come from the U.S. or a designated country.

Sometimes an item consists of components from various countries, and the components are assembled in an additional country. It can be difficult to determine which country is the “country of origin.” The trade agreements test to determine country of origin is “substantial transformation” (e.g., transforming an article into a new and different article of commerce, with a name, character, or use distinct from the original article) (refer to FAR 25.001(c)).

The responsibility for making a determination of substantial transformation rests solely with the contractor. The contractor can go to The Office of Regulations and Rulings within U.S. Customs and Border Protection, which is the Federal agency responsible for making substantial transformation determinations or giving their opinions. Their determinations or opinions are based upon tariff laws. The contractor may also request an opinion from a third party expert or make the determination himself.

The Internet address for the U.S. Customs and Border Protection is [www.cbp.gov](http://www.cbp.gov).

## Section 4: DOD Ordering Procedures (Section 803)



### DFARS 208.405-70 and GSA Multiple Award Schedules

#### GSA Schedule Orders Exceeding \$100,000

For orders of supplies or services exceeding \$100,000 that use Department of Defense (DoD) funds, ordering activities and non-DoD activities placing orders on behalf of the DoD must follow the policies and procedures in the Defense Federal Acquisition Regulation Supplement (DFARS) 208.405-70. When DFARS 208.405-70 is applicable and a conflict exists between the ordering procedures contained in this manual and the additional ordering procedures in DFARS 208.405-70, the DFARS procedures take precedence.

When using Schedules, DoD Contracting Officers and those authorized to place orders on behalf of the DoD must provide “fair notice” of an activity’s intent to make a purchase to as many Schedule contractors holders as practicable.

The number of Schedule contractors will be based upon appropriate market research that determines the likelihood that the contractors can provide the required services.

The ordering activity’s notice must include a description of the work to be performed and the basis on which the award will be made. DFARS 208.405-70 requires the Contracting Officer to contact as many Schedule contract holders as are capable of performing the work, as practicable, in order to ensure that at least three responses are received.

Posting an RFQ on the GSA’s eBuy system ([www.gsa.gov/ebuy](http://www.gsa.gov/ebuy)) is a simple and an effective way to provide fair notice to all contractors.

#### When DFARS 208.405-70 Applies

DFARS 208.405-70 applies to all orders and BPAs for supplies and services under the Schedules program that exceed \$100,000 and use DoD money. The restrictions of DFARS 208.405-70 apply, regardless of whether the order is placed by DoD or by another ordering activity using DoD funds, with the exception of orders for Architect-Engineering (A/E) services, which are subject to the Brooks Act. For more information on DFARS 208.405-70 (Section 803) users may want to take the DAU continuous learning module number CLC 010 “Proper Use of Non-DoD Contracts.”



#### DFARS 208.405-70 and GSA Schedule Blanket Purchase Agreements (BPAs) exceeding \$100,000 using DoD funds

There is no dollar limitation for BPAs established by ordering activities with Schedule contractors under the Schedules program. Prior to establishing single or multiple BPAs, the ordering Contracting Officer must comply with the competition requirements of DFARS 208.405-70.

When a single BPA is established, subsequent task orders may be placed without additional competition against the BPA. For multiple BPAs, Contracting Officers subject to the DFARS and guided by the DFARS PGI 208.404-70 additional ordering procedures should send the complete RFQ (including SOW and selection criteria) to all multiple BPA holders. This procedure is more stringent than that required for non-DoD Contracting Officers who are only required to solicit quotes from “an appropriate number of BPA holders” in accordance with FAR 8.405-3(b)(2).

The ordering Contracting Officer must review BPAs no less than annually to determine whether the BPAs still represent the best value.

### **Market Research is the Cornerstone**

Market research is the cornerstone to compliance with DFARS 208.405-70. Contracting Officers must identify which Schedule contractors are capable of performing the required work, as well as conduct market research to verify how many Schedule contractors are interested in the opportunity and to determine how many are likely to respond. The Contracting Officer must, at a minimum, review the Schedule contracts to determine which Schedule contractors are capable of performing the required work.

For task orders exceeding \$100,000 placed against Schedule contracts, the Contracting Officer has two options:

- ❖ Issue the notice to as many Schedule contractors as practicable, consistent with market research appropriate to the circumstances to reasonably ensure that offers will be received from at least three Schedule contractors who are capable of doing the work.
- ❖ Notify all Schedule contractors (for the applicable SINS) that can provide the required work by posting the RFQ on eBuy or by using another suitable mechanism to “push” the notification to Schedule contractors.

### **When Fewer than Three Responses are Received**

When fewer than three responses are received, the Contracting Officer may place the order if it did not result in more quotes provided the Contracting Officer determines in writing, that no additional contractors who can fulfill the requirement could be identified despite reasonable efforts to do so. However, if the Contracting Officer cannot document that sufficient market research was conducted to identify potential Schedule contractors capable of performing the work, and sufficient Schedule contractors were notified, the RFQ must be re-issued.

### **Methods of Ordering from a GSA Schedule Contract**

There are several methods that ordering activities can use to place an order. These include:

- ❖ Online orders on *GSA Advantage!*® using a governmentwide commercial purchase card
- ❖ Oral orders using a governmentwide commercial purchase card
- ❖ Written orders using agency-prescribed purchase order form
- ❖ Orders issued against a BPA
- ❖ eBuy



## Section 5: Responsibilities

---

When using Schedule contracts, ordering activities are encouraged to take on the role of “smart buyers.” In other words, ordering activities do not need to know how to produce the services/supplies required; instead, they need to be able to:

- ❖ Specify requirements
- ❖ Follow the ordering procedures
- ❖ Determine “Best Value”
- ❖ Select the right contractor
- ❖ Administer the order

### Past Performance

Ordering agencies should evaluate whether their contracting partners are reliable by examining their past performance. Past performance is a key indicator for predicting future performance. Elements of past performance may include the ability to meet contract requirements, good workmanship, quality, timeliness, responsiveness to customers and maintaining business relations as well as a firm’s ability to manage and document contract performance, costs and delivery schedules.

Ordering activities should be aware of the distinction between experience and past performance. In the evaluation of these two factors, ordering activities must be reasonable and consistent with the RFQ’s evaluation criteria.

- ❖ Experience is an objective evaluation criteria based on whether the Schedule contractor previously performed the requisite work.
- ❖ Past performance is defined as a measure of the degree to which a Schedule contractor has satisfied its customers in the past and complied with applicable laws and regulations. Past performance is considerably more open to interpretation.

## Additional Resources

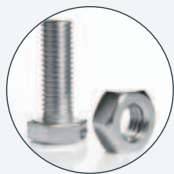
[www.ppirs.gov](http://www.ppirs.gov)

Past Performance Information Retrieval System (PPIRS) is a Web-enabled application that allows the retrieval of contractor past-performance information. This system is available to all source selection officials across the entire federal government. PPIRS is sponsored by the DoD eBusiness Office, and is administered by the Naval Sea Logistics Center Detachment Portsmouth. It is also a central warehouse used to retrieve performance assessment reports received from six of the recognized federal report card collection systems:

- ❖ The National Institutes of Health (NIH) Contractor Performance System (CPS)
- ❖ The National Aeronautics and Space Administration (NASA) Past Performance Data Base (PPDB)
- ❖ The Army's Past Performance Information Management System (PPIMS)
- ❖ The U.S. Army Corps of Engineers' Construction Contractor
- ❖ Appraisal Support System (CCASS)
- ❖ The Contractor Performance Assessment Reporting System (CPARS) used by the Navy, USMC, Air Force, DLA and other defense agencies

## Order Placement in the Case of a Contractor Debarred, Suspended, Proposed for Debarment

Ordering agencies should check the Excluded Parties Listing System (EPLS) prior to placing a Schedule order (refer to [www.epls.gov](http://www.epls.gov)). FAR 9.405-1, Debarment, Suspension and Ineligibility prohibits agencies from: placing orders exceeding the guaranteed minimum against existing contracts; placing orders against optional GSA Schedule contracts; adding new work; exercising options; and otherwise extending the duration of contracts with contractors that are debarred, suspended or proposed for debarment unless the agency head makes a determination that there are compelling reasons for doing so. This also applies to BPAs and Basic Ordering Agreements (BOAs).



### NUTS AND BOLTS TIP

Create your acquisition strategy.

- ❖ Identify objective of the acquisition
- ❖ Develop competitive requirement (e.g., performance-based acquisition)
- ❖ Use oral discussions
- ❖ Identify measures that show the objective will be met
- ❖ Manage the process



# Section 6: Making the Most of the GSA Schedules Program

---

## Understanding Terms and Conditions

The GSA Schedules program is designed to assist government customers in achieving their goals. The terms and conditions, including all clauses, are available for viewing for each Schedule through Schedules eLibrary. While GSA will not alter the terms and conditions of a Schedule contract in violation of CICA, nor alter the scope of a contract to meet an individual ordering activity's unique needs, an ordering activity may add terms to an order that do not conflict with the Schedule contract terms and conditions.

An explanation of the following Schedule contract terms and conditions is provided. To view all of the terms and conditions of a Schedule contract, visit contracts online through the Schedules eLibrary at [www.gsa.gov/elibrary](http://www.gsa.gov/elibrary).

Online Representations and Certifications Application (ORCA) for Schedule contractors can be viewed at <https://orca.bpn.gov>.

## Standing Solicitations

Standing solicitations are used in the Schedules program. Under the standing solicitation provisions, offerors may submit offers at any time. Contracts may be awarded for a full five-year period, regardless of when offers are submitted. Solicitations operating under these provisions do not set expiration dates. Identical items may be awarded to more than one Schedule contractor. This arrangement provides industry with the advantage of having a continuous opportunity to participate in the Schedules program and to provide the most current technology (refer to "How GSA Schedules are Awarded" on Page 11).

## Economic Price Adjustments (EPA)

Schedule contracts allow GSA Schedule contractors to renegotiate or modify prices in accordance with their commercial practices.

- ❖ Requests for price decreases may be submitted at any time during the contract period to the GSA Contracting Officer.
- ❖ Schedule contractors should refer to the EPA clauses in their Schedule Contract for guidance on how to properly request a price increase.

## Small Business

GSA and the Small Business Administration (SBA) strongly support the participation of small business concerns in the GSA Schedules Program. SBA policy allows agencies to include in their procurement base and goals, the dollar value of orders expected to be placed against Schedule contracts, and to report actual Schedule acquisitions as accomplishments against these goals. Currently, orders to Schedule 8(a) contractors do not receive 8(a) credit.



Ordering activities cannot set-aside a task order however, ordering activities may consider socioeconomic status when identifying contractor(s) for consideration or competition for award of an order or BPA. At a minimum, ordering activities should consider, if available, at least one small business, veteran-owned small business, service disabled veteran-owned small business, HUBZone small business, women-owned small business or small disadvantaged business Schedule contractor(s).



Schedule contractors' catalogs/pricelists, *GSA Advantage!*® and Schedules eLibrary contain information on a broad array of supplies and services offered by small business concerns. This information should be used as a tool to assist agencies in providing the maximum practicable opportunities for small business concerns, in order to meet or exceed established small business goals. The information should also be used as a tool to assist in identifying small business, veteran-owned small business, service-disabled veteran-owned small business, HUBZone small business, women-owned small business, and small disadvantaged business Schedule contractors when making a best value determination.

For orders exceeding the micro-purchase threshold, ordering activities should give preference to the items of small business concerns whenever two or more items at the same delivered price will satisfy the requirement (refer to FAR 8.405-5). In accordance with FAR 8.405-5(a), ordering activities should rely on the small business representations made by Schedule contractors at the contract level.



### NUTS AND BOLTS TIP

It is important to remember that socioeconomic status can be utilized as a primary evaluation factor in source selection.



### NUTS AND BOLTS TIP

Ordering activities may count orders with small business firms toward their procurement preference goals. Small Business Schedule contractors are identified in Schedules eLibrary and *GSA Advantage!*® by socioeconomic indicators (s-small business).



## Environmental Identification

[www.gsa.gov/enviro](http://www.gsa.gov/enviro)

GSA's goal is to become the preferred source for environmental products and services in the federal government. A variety of environmental products and services are available to Schedule users to assist them in their efforts to comply with procurement responsibilities outlined in federal environmental laws and regulations.

Environmental products and services are categorized as:

- ❖ Comprehensive Procurement Guideline Products and Other Recycled Products;
- ❖ Energy Star® Products and Other Energy Efficient Products;
- ❖ Biobased Products;
- ❖ Environmentally Preferable Products;
- ❖ Alternative Fuel Vehicles (refer to [www.gsa.gov/afv](http://www.gsa.gov/afv));
- ❖ Non-Ozone Depleting Substances;
- ❖ Priority Chemicals; and
- ❖ Safer Paints, Cleaning, and Other Chemical Products;
- ❖ Environmental Services (refer to [www.gsa.gov/environmentalservices](http://www.gsa.gov/environmentalservices)); and
- ❖ Energy Services (refer to [www.gsa.gov/energyservices](http://www.gsa.gov/energyservices)).

Schedule contractors are required to properly identify products that have environmental attributes to assist ordering activities seeking to comply with environmental laws and supporting regulations and executive orders (refer to GSAM 552.238-72). Schedule contractors are required to make their identifications in following mediums: (i) The offer itself; (ii) Printed commercial catalogs, brochures and pricelists; (iii) Online products Web site; (iv) Electronic data submission for GSA Advantage!® via GSA's Schedules Input Program (SIP) software or the Electronic Data Interchange (EDI). Ordering activities desiring to utilize service contracts that assist them with preparing environmental impact statements, compliance requirements, environmental/occupational training, remediation and other needs should refer to [www.gsa.gov/environmentalservices](http://www.gsa.gov/environmentalservices).

Energy Services (refer to [www.gsa.gov/energyservices](http://www.gsa.gov/energyservices)).

**Note:** *Customers should review Schedule contractor literature and contact the Schedule contractor directly to obtain complete information regarding environmental claims.*

Applicable guidance can also be found in FAR 23, DFARS 223 and on the GSA Environmental Products Web site at [www.gsa.gov/enviro](http://www.gsa.gov/enviro).

## Price Reductions

Ordering activities should seek a price reduction whenever the service or supply is available elsewhere at a lower price, when the SIN maximum order threshold is exceeded or whenever establishing a BPA. Ordering activities may request additional pricing discounts or concessions from Schedule contractors at any time. In response, a Schedule contractor can give an ordering activity a discount without passing the discount on to other authorized ordering activities (refer to FAR 8.4). The provision, in essence, allows the Schedule contractor to offer, and the government to accept, spot-pricing available in the commercial market.

This mechanism enhances competition and allows Schedule contractors to react more immediately to the commercial marketplace, move inventory and increase sales through promotional marketing.



### POWER BUYING TIP

“Spot pricing” allows the schedule contractor to reduce the GSA Schedule price at any time.

## Maximum Order

The Maximum Order (MO) threshold represents the point where, given the dollar value of the potential order, the ordering activity shall seek a price reduction. MO thresholds under the Schedules program are assigned to each SIN (refer to FAR 8.405-1(d)). When considering orders exceeding the maximum order threshold or when establishing a BPA (refer to 8.405-2(c)(3)). The MO is NOT an order limitation and ordering activities can place orders of any size.



### POWER BUYING TIP

Ordering activities are required to ask for a price reduction for orders above the MO. The GSA Schedule contractor may:

- ❖ Offer a lower price
- ❖ Offer the current contract price
- ❖ Decline the order

The MO is listed in every Schedule contractor’s price list and in *GSA Advantage!*®.



## Performance Incentive

Performance incentives may be agreed upon between the contractor and the ordering office on individual orders or in a BPA.

To the maximum extent practicable, ordering activities may consider establishing incentives when performance is critical to the agency’s mission and incentives are likely to motivate the contractor. Any incentive clause that the Schedule user includes should be:

- ❖ Designed to relate results achieved to specified targets; and
- ❖ Based on contractor achievement of measurable performance objectives.

For example, in a service contract, the quality assurance surveillance plan (QASP) might identify an acceptable quality level (AQL) of 97 percent on-time performance. The order could also provide a price incentive if the contractor performs on time 99 percent of the time.

The RFQ should identify any performance incentive clause that the ordering office intends to include in the resulting order or BPA.

The ordering office must establish a maximum performance incentive price for the services and/or total solutions on individual orders or a BPA utilizing performance incentives.

## Worldwide Coverage, Expedited Delivery

A primary goal of the Schedules program is to service the customer, regardless of geographic location. Schedule contracts offer the following choices of delivery:

- ❖ Worldwide – covering domestic and overseas delivery
- ❖ Domestic – covering delivery to the 48 contiguous states, Washington, D.C., Alaska, Hawaii and Puerto Rico
- ❖ Overseas Only – covering delivery to overseas destinations other than Alaska, Hawaii and Puerto Rico

Many Schedule contractors are able to deliver overnight or within a few days.

## Trade-ins

Ordering activities should consider trade-ins against the purchase of new equipment when determining the “Best Value” purchase or at the lowest overall cost; e.g., the price of the item plus administrative costs. If equipment was traded in as part of the purchase arrangement, the file should show the type, brand and value of the equipment exchanged. Trade-ins must comply with provisions of the Federal Property Management Regulations refer to 41 CFR 102.39 ([www.access.gpo.gov/nara/cfr/waisidx\\_99/41cfrv2\\_99.html](http://www.access.gpo.gov/nara/cfr/waisidx_99/41cfrv2_99.html)).



### POWER BUYING TIP

Trade-ins are allowable and can be applied directly to orders placed against GSA Schedule contracts.

## Governmentwide Commercial Purchase Card – GSA SmartPay®

A governmentwide commercial purchase card is issued by government agencies and allows federal employees to make official purchases. Schedule contractors are required to accept the governmentwide commercial purchase card for orders up to the micro-purchase threshold and are encouraged to accept the purchase card for purchases above this threshold.



### POWER BUYING TIP

Ordering activities may make payments for oral or written orders using the governmentwide commercial purchase card (refer to FAR 8.405-7).

The purchase card enables day-to-day business purchases and allows ordering activities to manage the information contained in the management information reports in order to negotiate better discounts from contractors.

## Benefits of the GSA SmartPay® Program

The GSA SmartPay® program provides the federal government and its contractors with numerous benefits including:

- ❖ A streamlined purchasing process that eliminates the use of purchase orders and reduces administrative costs
- ❖ An improved payment process that allows fully automated invoicing and payment processing
- ❖ Performance-based refunds for agencies based on net charge volume
- ❖ Electronic access systems that allow for streamlined financial operations and allocation methods

Remember to identify your ordering activity as a Schedule customer whenever placing an order and ask Schedule contractors for their Schedule contract numbers and Schedule pricing.



### NUTS AND BOLTS TIP

Each agency must designate an Agency/Organization Program Coordinator (A/OPC) who shall function as the agency's primary liaison to the purchase card-issuing bank and to GSA. The agency must also identify cardholders and designate a billing disputes office.

Under the governmentwide purchase card program, an annual review of cardholder and approving official records must be performed on a fiscal year basis.

The GSA SmartPay® Web site, available at [www.gsa.gov/smartpay](http://www.gsa.gov/smartpay), provides a copy of the Master Contract, contractor guides, performance summaries, a list of agency representatives for questions and answers, agency information, and points of contact. Web-based training for agency/ program coordinators is available at [www.gsa.gov/aopcpurchasetraining](http://www.gsa.gov/aopcpurchasetraining).

A self-paced tutorial is also available at [www.gsa.gov/aopcpurchasetraining](http://www.gsa.gov/aopcpurchasetraining) to instruct new cardholders how to use the purchase card responsibly.



### NUTS AND BOLTS TIP

Whenever the purchase card is used as a payment method for a contract action, the contract action may be applied toward ordering agencies goals based upon the socioeconomic characteristics of the GSA Schedule contractor.

# Section 7: Inspection/Acceptance and Terminations

## Inspection and Acceptance

### ❖ Services

The ordering activity has a right to inspect all services in accordance with the contract requirements and as called for by the order.

The ordering activity must perform inspections and tests as specified in the order's quality assurance surveillance plan (QASP).

### ❖ Supplies

The ordering activity (or designated representative) must inspect supplies at destination except when there is mandatory source inspection required by the Schedule contracting agency or the Schedule item is covered by a supply description, and the ordering activity determines that the Schedule contracting agency's inspection assistance is needed. For additional information, refer to FAR 8.406-2 (a) at [www.acqnet.gov/far/index.html](http://www.acqnet.gov/far/index.html).

## Termination for Cause

### Nonconformance of Supplies/Services (Refer to FAR 8.406-3)

If a contractor delivers a supply or service, but it does not conform to the order requirements, the ordering activity shall take appropriate action in accordance with the inspection and acceptance clause of the contract, as supplemented by the order.

If the contractor fails to perform an order, or take appropriate corrective action, the ordering activity may terminate the order for cause or modify the order to establish a new delivery date (after obtaining consideration, as appropriate). Ordering activities shall follow the procedures in FAR 8.406-4, when terminating an order for cause.

An ordering activity contracting officer may terminate individual orders for cause. The ordering activity shall notify the Schedule contracting officer of all instances of termination for cause of individual orders or if fraud is suspected. If the contractor asserts that the failure was excusable, the ordering activity contracting officer shall follow the procedures in FAR 8.406-6, as appropriate.



### NUTS AND BOLTS TIP

Only the Schedule Contracting Officer may modify the Schedule contract to terminate any or all supplies or services covered by the Schedule contract for cause (refer to FAR 8.406-4(d)).

#### **FAR 8.406-4, Termination for Cause**

Termination for cause shall comply with FAR 12.403 and may include charging the Schedule contractor with excess costs resulting from repurchase.

If the contractor is charged excess costs, the following apply:

- ❖ Any repurchase shall be made at as low a price as reasonable, considering the quality required by the government, delivery requirement and administrative expenses. Copies of all repurchase orders, except the copy furnished to the contractor or any other commercial concern, shall include the notation: Repurchase against the account of [insert contractor's name] under Order [insert number] under Contract [insert number].

When excess costs are anticipated, the ordering activity may withhold funds due the contractor as offset security. Ordering activities shall minimize excess costs to be charged against the contractor and collect or set-off any excess costs owed.

If an ordering activity is unable to collect excess repurchase costs, it shall notify the Schedule Contracting Officer after final payment to the contractor.

The notice shall include the following information about the terminated order:

- A.** Name and address of the contractor
- B.** Schedule, contract and order number
- C.** National stock number, if applicable, or special item number and a brief description of the item(s)
- D.** Cost of Schedule items involved
- E.** Excess costs to be collected
- F.** Other pertinent data

The notice shall also include the following information about the purchase contract:

- A.** Name and address of the contractor
- B.** Item repurchase cost
- C.** Repurchase order number and date of payment
- D.** Contract number, if any
- E.** Other pertinent data

Only the Schedule Contracting Officer may modify the contract to terminate for cause any or all supplies or services covered by the Schedule contract. If the Schedule Contracting Officer has terminated any supplies or services covered by the Schedule contract, no further orders may be placed for those items. Orders placed prior to termination for cause shall be fulfilled by the contractor, unless terminated for the convenience of the government by the ordering activity Contracting Officer.

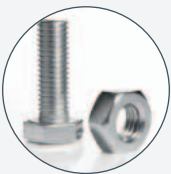
## Termination for the Government's Convenience

FAR 8.406-5 permits the ordering activity Contracting Officer to terminate individual orders for the convenience of the government when it is in the government's best interest. Terminations for convenience must comply with FAR 12.403.

Before terminating orders for the government's convenience, the ordering activity Contracting Officer shall endeavor to enter into a "no-cost" settlement agreement with the contractor. Only the Schedule Contracting Officer has the authority to modify the Schedule contract to terminate any or all supplies or services covered by the Schedule contract for the government's convenience. Ordering agencies have authority to terminate individual orders.

Disputes (refer to FAR 8.406-6) pertaining to the performance of orders under a Schedule contract, the ordering activity Contracting Officer may:

- ❖ Issue final decisions on disputes arising from performance of the order
- ❖ Refer the dispute to the Schedule Contracting Officer



### NUTS AND BOLTS TIP

**FAR 52.212-4(I), Contract Terms and Conditions – Commercial Items, Termination for the Government's convenience.** In the event of such termination, the Contractor shall immediately stop all work hereunder and shall immediately cause any and all of its suppliers and subcontractors to cease work.

The ordering activity Contracting Officer shall notify the Schedule Contracting Officer promptly of any final decision. If the dispute pertains to the terms and conditions of Schedules contract, the ordering activity Contracting Officer shall refer the dispute to the Schedule contracting officer for resolution under the Disputes clause of the contract and notify the Schedule contractor of the referral.

- ❖ Appeals: Contractors may appeal final decisions to either the Board of Contract Appeals servicing the agency that issued the final decision or the U.S. Court of Federal Claims
- ❖ Alternative dispute resolution: The contracting officer should use the alternative dispute resolution (ADR) procedures, to the maximum extent practicable (refer to 33.204 and 33.214)



## Section 8: Request for Quote (RFQ) and Statement of Work (SOW)

---

In recent years, GSA has sought to facilitate broad access to service contractors. To assist its customers, GSA developed ordering procedures for services requiring an SOW located in FAR 8.405-2 at [www.acqnet.gov/far/index.html](http://www.acqnet.gov/far/index.html).

For services requiring an SOW, follow the procedures in FAR 8.405-2.

**Note:** *Generally, ordering activities use these procedures when ordering services priced at hourly rates as established by Schedule contracts. The applicable services will be identified in the GSA Schedules and the contractor's price list.*

An SOW is necessary when acquiring a service that does not rely on the Schedule contractor's commercial description to define the requirements (e.g., program management services). Using this example, the SOW would describe the requirements for a management process improvement program that must be met — the tasks, deliverables and specific delivery dates.

### Understanding an SOW

An SOW is essential when purchasing commercial services. Be aware that SOWs are read and interpreted by government and industry personnel with diverse backgrounds such as engineering, science, accounting, law, contracting and other business fields.

The SOW must be clear, precise, complete and concise. It should contain the following elements per FAR 8.405-2:

- ❖ Work to be performed
- ❖ Location of work
- ❖ Period of performance
- ❖ Deliverable Schedule
- ❖ Applicable performance standards
- ❖ Any special requirements such as security clearances, travel or special knowledge

To the maximum extent practicable, agency requirements shall be performance-based (refer to FAR 37.6, Performance-Based Acquisition).

### Background

- ❖ Describes the project in general terms
- ❖ Discusses the purpose of the project — in other words, why the project is being pursued and how it relates to other projects.
- ❖ Include, as necessary, a summary of statutory authority or applicable regulations
- ❖ Provides copies of pertinent background materials, and includes them in a reference or attachment



### NUTS AND BOLTS TIP

There are some general preparation guidelines to consider when preparing an SOW:

- ❖ Preparation responsibility. Normally, the person responsible for preparing the purchase request may also be responsible for preparing the SOW. If so, the person may seek advice and assistance from others involved in the acquisition process.
- ❖ The person responsible for issuing the delivery/task order must assure that the SOW is adequate for the acquisition. If the functions are not completed by the same person, it is important for the preparer of the purchase request and the preparer of the SOW to work together to assure that the services required are clearly described.

### Objectives

Provide a concise overview of the project and how the results or end products will be used; includes goals.

### Scope

Covers the general scope of the work the Schedule contractor will perform and what the government expects to be accomplished.

### Tasks or Requirements

Describes detailed work and management requirements.



### NUTS AND BOLTS TIP

Remember to define requirements within the scope of commercial items or services.

All services ordered must be within the scope of the GSA Schedule contract.

### Deliverables or Delivery Schedule

Describes what the Schedule contractor shall provide; identifies the Schedule contractor's responsibilities; specifies any specialized expertise, and services, training and documentation, as applicable; clearly states the deliverables required, schedule for delivery, quantities and to whom they will be delivered; describes the delivery schedule in terms of calendar days from the date of award; and identifies the type of documentation (printed and/or electronic) to be provided, as well as the quality indicators desired by the government.

### Government Furnished Equipment (GFE) and Government Furnished Information (GFI)

- ❖ "GFE" identifies any government-furnished equipment
- ❖ "GFI" (government furnished information) refers to drawings and data beyond the specifications that will be incorporated into the final product

## Security Provisions

States any security requirements, as necessary, for the work to be performed.

## Place of Performance

Specifies whether the work is to be performed at a government site or the contractor's site.

## Period of Performance

Specifies the performance period: e.g., hours, days, weeks or months

## RFQ

A RFQ for services requiring an SOW must include the SOW and the quote evaluation criteria, refer to FAR 8.405-2(c).

A RFQ should ensure the following information is included:

- ❖ RFQ identification number
- ❖ Issuing organization and point-of-contact
- ❖ RFQ closing date and time
- ❖ Notification that only Schedule contractors will be considered
- ❖ If applicable, the intention to award a Single or Multiple BPA
- ❖ Instructions to offerors as necessary (e.g., page limits)
- ❖ Other pertinent information — such as agency-specific provisions and clauses that do not conflict with Schedule contract clauses
- ❖ Other information may be included in the SOW part of the RFQ

## Evaluation/Selection Criteria

This section of the RFQ identifies the selection criteria; e.g., technical excellence, management capability, prior experience, personnel qualifications, delivery or performance schedule compliance and/or past performance refer to “Best Value” on Page 17.

**Note:** *Ordering activities must treat all Schedule contractors fairly and inform them of the requirements of the potential order. The ordering activity must evaluate competitive proposals solely on the factors specified in the RFQ evaluation criteria.*

When an ordering activity issues an RFQ, the request should include the SOW and it shall ask Schedule contractors to submit a price quote to provide the services as outlined in the SOW. The price shall be based on the prices in the Schedule contracts and shall consider the mix of labor categories and level of effort required to perform the services described in the SOW. A firm fixed price order shall be requested, unless the ordering activity makes a determination that it is not possible at the time of placing the order to estimate accurately the extent or duration of the work or to anticipate cost with any reasonable degree of confidence. When such a determination is made, a labor-hour or time-and-materials quotation may be requested. The firm fixed price of the order should also include any travel costs or other direct charges related to performance of the services ordered, unless the order provides for reimbursement of travel costs at the rates provided in the Federal Travel or Joint Travel Regulations. A ceiling price must be established for labor-hour and time-and-materials orders.



### NUTS AND BOLTS TIP

A determination of reasonable pricing for services offered should be based on the following three variables:

- ❖ Hourly rates
- ❖ Labor categories proposed to fulfill the task
- ❖ Number of hours proposed for each category

The ordering agency must analyze the mix of categories, hours and rates to determine if the total price for the task is reasonable.

Remember: GSA has already determined that the hourly labor rates are fair and reasonable.



### NUTS AND BOLTS TIP

Remember to require in the RFQ that the quoted prices conform to the Schedule contract prices (equal to or lower than) and to seek additional price reductions where appropriate.

**Note:** *Items/services not on the Schedule contract may be considered "open market."*

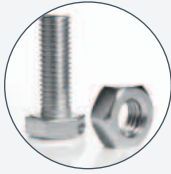
## Open Market Items

In accordance with FAR 8.402(f), for administrative convenience, an ordering activity Contracting Officer may add items not on the GSA Schedule contract — e.g., open market items — to a GSA Schedule BPA or an individual task or delivery order only if:

- ❖ All applicable acquisition regulations pertaining to the purchase of the items not on the Schedule contract have been followed (e.g., publicizing (FAR Part 5), competition requirements (FAR Part 6), acquisition of commercial items (FAR Part 12), contracting methods (FAR Parts 13, 14, and 15), and small business programs (FAR Part 19))
- ❖ The ordering activity Contracting Officer has determined the prices for the items not on the Schedule contract are fair and reasonable
- ❖ The items are clearly labeled on the order as items not on the Schedule contract; and
- ❖ All clauses applicable to items not on the Schedule contract are included in the order
- ❖ The ordering Contracting Officer has determined that the items are within the scope of the Schedule contract

It is important to recognize that GSA has only negotiated prices or determined prices to be fair and reasonable for those services and supplies that are awarded to Schedule contracts. **Therefore, the ordering activity must comply with the requirements for full and open competition, by following all applicable acquisition regulations and determining price reasonableness for open market items.**





### NUTS AND BOLTS TIP

The terms and conditions of the Schedule contract do not apply to open market items and all contract clauses applicable to such items must be included in the order.



Any additional requirements included in a Schedule order must not conflict with the scope of the Schedule contract. Remember, orders must be for commercial items or services within the purview after FAR 12, not just within the scope of a particular Schedule contract, to remain within scope.



### NUTS AND BOLTS TIP

Orders with Cost type pricing arrangements are NOT allowed under Schedules!

## Performance-Based Acquisitions (PBA)

Performance-based contracting (refer to FAR 37.6) methods are intended to ensure that required performance quality levels are achieved and that total payment is related to the degree that services performed or outcomes achieved meet contract standards.

To the maximum extent practicable, agency requirements shall be performance-based (refer to FAR 37.6). Visit [www.acqnet.gov/comp/seven\\_steps/index.html](http://www.acqnet.gov/comp/seven_steps/index.html) to review “Seven Steps to Performance - Based Acquisition.”

To assist you, the Center for Acquisition Excellence has developed a Toolkit. The PBA Toolkit provides a simple step process that allows you to develop and practice your understanding of effectively completing the tasks associated with PBA.



Log on to [www.gsa.gov/centerforacquisitionexcellence](http://www.gsa.gov/centerforacquisitionexcellence) to see what the PBA Toolkit has to offer.

## Use of Oral Presentations

Ordering agencies may utilize oral presentations at their discretion. Oral Presentations can potentially reduce the time and cost associated with proposal information. Often, it is easier to communicate and explain an offeror's capabilities either orally or visually instead of in writing. Oral presentations also allow for greater face-to-face interaction and are especially important in those acquisitions where the offeror's key personnel are critical to the success of an acquisition.

Oral presentations by offerors as requested by the government may substitute for, or augment, written information. Use of oral presentations as a substitute for portions of a proposal can be effective in streamlining the source selection process. Oral presentations may occur at any time in the acquisition process, and are subject to the same restrictions as written information, regarding timing oral presentations provide an opportunity for dialogue among the parties. Pre-recorded videotaped presentations that lack real-time interactive dialogue are not considered oral presentations for the purposes of this section, although they may be included in offeror submissions, when appropriate.

The SOW may require each offeror to submit part of its proposal through oral presentations. However, certifications, representations and a signed quote sheet (including any exceptions to the government's terms and conditions) shall be submitted in writing.

Information pertaining to areas such as an offeror's capability, past performance, work plans or approaches, staffing resources, transition plans or sample tasks (or other types of tests) may be suitable for oral presentations. In deciding what information to obtain through an oral presentation, consider the following:

- ❖ The government's ability to adequately evaluate the information
- ❖ The need to incorporate any information into the resultant contract
- ❖ The impact on the efficiency of the acquisition
- ❖ The impact (including cost) on small businesses. In considering the costs of oral presentations, contracting officers should also consider alternatives to on-site oral presentations (such as teleconferencing, video teleconferencing).

When oral presentations are required, the SOW or Statement of Objectives (SOO) shall provide offerors with sufficient information to prepare them. Accordingly, the SOW or SOO may describe:

- ❖ The types of information to be presented orally and the associated evaluation factors that will be used
- ❖ The qualifications for personnel that will be required to provide the oral presentation(s)
- ❖ The requirements for, and any limitations and/or prohibitions on, the use of written material or other media to supplement the oral presentations
- ❖ The location, date, and time for the oral presentations
- ❖ The restrictions governing the time permitted for each oral presentation

The scope and content of exchanges that may occur between the government's participants and the offeror's representatives as part of the oral presentations, including whether or not discussions will be permitted during oral presentations.

The contracting officer shall maintain a record of oral presentations to document what the government relied upon in making the source selection decision. The method and level of detail of the record (such as: videotaping, audio tape recording, written record, government notes and copies of offeror briefing slides or presentation notes) shall be at the discretion of the source selection authority. A copy of the record placed in the file may be provided to the offeror.

When an oral presentation includes information that the parties intend to include in the contract as material terms or conditions, the information shall be put in writing. Incorporation by reference of oral statements is not permitted.

## Additional Resources

Refer to the following Web sites for more information:

### **Guidelines for the Use of Oral Presentations**

[www.professionals.pr.doe.gov/ma5/MA-5Web](http://www.professionals.pr.doe.gov/ma5/MA-5Web)

[www.nsf/Procurement/Oral+Presentations?OpenDocument](http://www.nsf/Procurement/Oral+Presentations?OpenDocument)

### **Defense Acquisition Guidebook**

Search [www.deskbook.osd.mil](http://www.deskbook.osd.mil) using keywords “oral presentations”

### **Center for Acquisition Excellence**

<http://cae.gsa.gov>

GSA has prepared the *GSA Schedule Order Checklist* to assist your Schedule order and BPA pre-award and post-award actions. The checklist can be found under “Documents” when registered for the free online ordering officer course “*Using GSA Schedules – Customer*” at the GSA Center for Acquisition Excellence, <http://cae.gsa.gov>.



## Section 9: Schedule Blanket Purchase Agreements (BPAs)

---

A Schedule BPA is established by an ordering activity with a Schedule contract to fill repetitive needs for supplies or services (refer to FAR 8.405-3). BPAs leverage an ordering activity's buying power in taking advantage of quantity discounts, saving administrative time and reducing paperwork. BPAs may be established with one or more Schedule contractors.

BPAs are considered to be issued using full and open competition when using the procedures in FAR 8.4 (refer to FAR 6.102(d)(3)) at [www.acqnet.gov/far/index.html](http://www.acqnet.gov/far/index.html)). Ordering activities shall not seek competition outside of the Schedules or synopsize the requirement.

### Benefits of a Schedule BPA

Contractual terms and conditions are contained in Schedule contracts and are not to be re-negotiated when establishing GSA Schedule BPAs. Therefore, as a purchasing option, Schedule BPAs eliminate such contracting and open market costs as the search for sources, the need to prepare solicitations and the requirement to synopsize the acquisition. BPAs also:

- ❖ Provide an opportunity to negotiate improved discounts
- ❖ Satisfy recurring requirements
- ❖ Reduce administrative efforts by eliminating repetitive, individual orders and payments
- ❖ Let customers obtain better value by leveraging buying power through volume purchasing
- ❖ Enable an ordering activity to use streamlined ordering procedures
- ❖ Permit an ordering activity to incorporate Contractor Team Arrangements (CTAs)
- ❖ Allow for quicker turnarounds on orders
- ❖ Permit an ordering office to incorporate terms and conditions not in conflict with the underlying contract

A Schedule BPA can be set up for an agency's field offices across the nation, thus allowing them to participate in the Schedule BPA and place orders directly with Schedule contractors. In doing so, the entire agency reaps the benefits of additional discounts negotiated into the Schedule BPA.

A multi-agency Schedule BPA is also permitted if the Schedule BPA identifies the participating agencies and their estimated requirements at the time the Schedule BPA is established.

### Setting up a GSA Schedule BPA

Schedule BPAs under the GSA Schedules Program are established using Schedule ordering procedures; e.g, the Ordering Procedures for Supplies, and Services Not Requiring

a Statement of Work (SOW) (refer to FAR 8.405-1) or the Ordering Procedures for Services Requiring a Statement of Work (SOW) (refer to FAR 8.405-2). An ordering activity shall request a price reduction when establishing a Schedule BPA, regardless of the size of individual orders.

Ordering activities may consider socioeconomic status when identifying contractors for consideration or competition for award of an order or Schedule BPA. At a minimum, ordering activities should consider, if available, at least one small business, veteran-owned small business, service disabled veteran-owned small business, HUBZone small business, women-owned small business, or small disadvantaged business Schedule contractor (refer to FAR 8.405-5). GSA *Advantage!*® and Schedules eLibrary contain information on small business representations of Schedule contractors.

Schedule BPAs shall address the frequency of ordering, invoicing, discounts, requirements (e.g., estimated quantities, work to be performed), delivery locations, and time. When establishing multiple Schedule BPAs, the ordering activity shall also specify **the procedures for placing orders under the Schedule BPAs**.

## Single BPA

A single BPA should be established using the same procedures outlined in FAR 8.405-1 or 8.405-2. When establishing a single BPA, the ordering activity should address the following:

- ❖ The frequency of ordering, invoicing, discounts, requirements (or estimated quantities, work to be performed), delivery locations and time
- ❖ Supplies or services to be ordered and type of pricing, such as hourly rate services
- ❖ A Firm Fixed Price (FFP), or Labor Hour or Time and Materials (T & M) pricing arrangement for individual tasks or orders as allowed in the GSA Schedule Contract
- ❖ That a single BPA contractor can meet estimated requirements
- ❖ That the government will obtain the best value from a single Schedule contractor, while considering likely quantity discounts, administrative savings and other benefits related to reduced acquisition lead-time
- ❖ Authorized users

For example, you have a recurring requirement for a wide variety of common use electronic components for “in-house” maintenance of the agency’s information technology equipment. Using Schedule’s eLibrary, you find that IT support equipment is listed under Schedule 70, Special Item Number (SIN) 132 8, and that there are numerous IT dealerships whose Schedule contract price lists include the wide range of supplies that you require. Several of the dealerships are small.

You issue a Request for Quotes (RFQ) for a single award Schedule BPA encompassing the indefinite quantities of items in the generic categories of the types of supplies you require, e.g., microchips, hard drives, flash memories, etc. You establish evaluation factors such as business size, past performance, delivery and price.

### Advantages of Single Schedule BPA Include:

- ❖ Simplifying all of your future orders — for items covered by BPA you can go to just one Schedule vendor
- ❖ Better pricing and terms by leveraging the full value of the requirement to attach the maximum competition

### Multiple BPAs

Multiple BPAs should be established using the procedures in FAR 8.405-3 at [www.acqnet.gov/far/index.html](http://www.acqnet.gov/far/index.html). Multiple BPAs are established with more than one Schedule contractor. They are appropriate when the ordering activity determines that more than one BPA is needed to meet its needs, or when the requirement is less defined. The number of BPAs to be established is within the discretion of the ordering activity establishing the BPAs and should be based on a strategy that is expected to maximize the effectiveness of the BPA(s). In determining how many BPAs to establish, consider:

- ❖ The scope and complexity of the requirement(s)
- ❖ The need to periodically compare multiple technical approaches or prices
- ❖ The administrative costs of Multiple BPAs
- ❖ The technical qualifications of the Schedule contractor(s)



#### NUTS AND BOLTS TIP

If the BPA is for hourly rate services, the ordering activity shall develop a statement of work for requirements covered by the BPA. All orders under the BPA should specify a price for the performance of the tasks identified in the statement of work.

If the ordering activity establishes Multiple BPAs, before placing an order exceeding the micro-purchase threshold, the ordering activity shall:

- ❖ Forward the requirement, or SOW and the evaluation criteria, to an appropriate additional number of Schedule BPA holders in accordance with the BPA ordering procedures.
- ❖ Evaluate the responses received, make a “Best Value” determination (refer to FAR 8.404(d) at [www.acqnet.gov/far/index.html](http://www.acqnet.gov/far/index.html)) and place the order with the Schedule BPA holder that represents the best value.

### Duration of Schedule BPAs

Schedule BPAs generally should not exceed five years in length, but may do so to meet program requirements. Contractors may be awarded Schedule BPAs that extend beyond the current term of their Schedule contract, so long as there are option periods in their Schedule contract that, if exercised, will cover the Schedule BPA's period of performance (refer to FAR 8.405-2 (c)).

## Review of Schedule BPAs

The ordering activity that established the Schedule BPA shall review it at least once a year to determine whether:

- ❖ The Schedule contract, upon which the Schedule BPA was established, is still in effect
- ❖ The Schedule BPA still represents the best value (refer to 8.404(d))
- ❖ Estimated quantities/amounts have been exceeded and additional price reductions can be obtained
- ❖ The ordering activity shall document the results of its review



### NUTS AND BOLTS TIP

GSA has established that the prices contained within the contractor's Schedule price list are fair and reasonable. However, the ordering activity is responsible for considering the level of effort and mix of labor proposed to perform a specific task being ordered, and for making a determination that the Total Price is fair and reasonable.

For example, video production services may be considered less defined in the sense that the ordering activity may know that they will require five videos during the next year but are unsure of the length, format or objective (educational, promotional, informational, etc.) of each video. In this case, the ordering activity may elect to award multiple BPAs so that they may maximize the potential for "Best Value" for each order placed.

Guide for Establishing Single/Multiple BPAs for Products and Services Requiring an SOW		
If –	Then –	You would –
Consider whether the recurring tasks are substantially similar (Multiple Award) or substantially dissimilar (Single Award)  Or the tasks you are purchasing can clearly be identified, such as mail management (accepting incoming mail and mail distribution)	Follow the procedures in FAR 8.405	Make a "Best Value" selection and establish a <b>Single BPA</b>  <b>Note:</b> <i>You may then place all orders with the BPA holder without further "Best Value" selections. Remember when establishing a BPA to seek a price reduction!</i>
The tasks you are planning on purchasing cannot be clearly defined, such as program management support for multiple offices	Follow the procedures in FAR 8.405	Establish <b>Multiple BPAs</b> with technically qualified Schedule contractors  <b>Note:</b> <i>When issuing an order off of a multiple BPA, you must forward the requirement or SOW and the evaluation criteria to an appropriate number of BPA holders, as established in the BPA ordering procedure.</i>

If –	Then –	You would –
Your BPA estimate is at or below the micro-purchase threshold	Follow the procedures in FAR 8.405-2	Prepare SOW (with evaluation criteria) and RFQ and transmit to three Schedule BPA holders
Your BPA estimate exceeds the maximum order threshold	Follow the procedures in FAR 8.405-2	Provide the RFQ (including the SOW and evaluation criteria) to additional Schedule contractors. When determining the appropriate number of additional Schedule contractors, the ordering activity may consider, among other factors, the complexity, scope and estimated value of the requirement and the market research results. Over the maximum order threshold, you must seek price reductions.
<b>BPAs for Hourly Rate Services</b>		
The BPA is for hourly rate services	Follow the procedures in FAR 8.405	Request a ceiling price for the performance of the tasks identified in the SOW for all orders placed against the BPA
<b>Duration of BPAs</b>		
The ordering activity establishes a BPA that extends beyond the current term of the GSA Schedule contract upon which the BPA was established	BPA should not extend beyond five years	Option periods that are included in the BPA that are within the Schedule contract option periods
Generally, BPAs should not exceed five years in length	BPAs may be extended to meet program requirements, but cannot exceed the contract period	Contractors may be awarded BPAs that extend beyond their current Schedule contracts, provided there are option periods in their Schedule contracts that, if exercised, will cover the BPA's period of performance
<b>BPA Documentation</b>		
<p><b>When establishing Blanket Purchase Agreements under the GSA Schedules Program, the ordering activity shall document:</b></p> <ul style="list-style-type: none"> <li>❖ The Schedule contracts considered, noting the contractors with which BPAs have been established</li> <li>❖ A description of the requirements (e.g., estimated quantities, work to be performed)</li> <li>❖ The results of negotiations including agreed upon pricing</li> <li>❖ The estimated value</li> <li>❖ If applicable, the circumstances and rationale for restricting consideration of Schedule contractors to fewer than required in the Schedule ordering procedures</li> <li>❖ The evaluation methodology used in selecting the contractor to receive the BPA(s)</li> <li>❖ The rationale for any tradeoffs in making the selection</li> <li>❖ The fair and reasonable price determination required by FAR 8.405-2(d) for BPAs with hourly rate services</li> <li>❖ If applicable, the rationale for placing other than firm fixed price or performance-based orders</li> <li>❖ The results of the annual review</li> </ul>		

## BPA Documentation

### When ordering from BPAs, the ordering activity shall document:

- ❖ The BPA holder from which the supply or service was purchased
- ❖ A description of the supply or service purchased
- ❖ The amount paid
- ❖ The total price for any orders are reasonable by performing a price determination as required by FAR 8.405-2(d) considering the level of effort and mix of labor
- ❖ If applicable, the rationale for using other than a firm fixed price order or a performance-based order

### If ordering from multiple BPAs, in addition to the above, the ordering activity shall document:

- ❖ The BPAs considered
- ❖ The evaluation methodology used in selecting the BPA holder to receive the order
- ❖ The rationale for any tradeoffs in making the selection

## Review of BPAs

The ordering activity has established a BPA	The BPA shall be reviewed at least once a year	Review the Schedule contract upon which the BPA is based to determine whether it is still in effect. Determine whether the BPA still represents the best value (refer to FAR 8.404(d)). Determine whether the estimated quantities/amounts have been exceeded and attempt to obtain additional price reductions. Document the results of the review.
---	--	--

**Note:** For Ordering Procedures for Supplies and Services exceeding \$100,000 when using DoD funds, follow procedures listed on Page 24, Section 803 and Schedules or refer to DFARS 208.405-70.



### NUTS AND BOLTS TIP

The RFQ should inform the Schedule contractors if you intend to establish a single or multiple BPA. It also must tell them the evaluation criteria you will use for the award and the relative importance of those evaluation factors.

## Setting up a Multi-Agency Schedule BPA

Before a Multi-Agency BPA is established, multiple ordering activities should identify, define and consolidate their requirements to obtain greater discounts. All users must also be identified as signatories. To ensure “Best Value” is obtained, the BPA must reflect the requirements of all users with an estimate of the quantity.

The ordering activity can set up a Schedule BPA so that the agency’s various ordering activities/field offices may place orders against the Schedule BPA directly with the Schedule contractor. In order for these ordering activities/field offices to participate in the Schedule BPA, the Schedule BPA must list the users and corresponding points of contact (refer to FAR 8.405-3(a)(4) at [www.acqnet.gov/far/index.html](http://www.acqnet.gov/far/index.html)).

## Obligation of Funds

A Schedule BPA does not require the obligation of funds. Funds are obligated when orders are placed against the BPA. Since the government is not obligated to make any purchases under the BPA, this can be stated as:

- ❖ “The government estimates, but does not guarantee, that the volume of purchases using this BPA will be \$\_\_\_\_\_ (estimate). This BPA does not obligate funds. The government is obligated only to the extent of authorized orders actually made against the BPA.”

## Sample Schedule BPA

A Sample BPA format is available to help capture the necessary elements. Download a copy of a sample BPA at [www.gsa.gov/bpa](http://www.gsa.gov/bpa), click on the Blanket Purchase Agreement Format link. For additional guidance and training on BPAs, visit the Center for Acquisition Excellence at <http://cae.gsa.gov>.



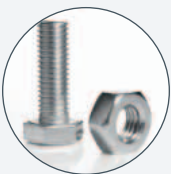
## Using Options Under a Schedule BPA

Schedule BPAs against Schedule contracts may be established with options that extend beyond the end of the basic Schedule contract period, provided that the basic Schedule contract period has options that if exercised will cover the BPA's period of performance. If the current Schedule contract period expires and its options are not exercised, the option of the BPA cannot be exercised. The underlying Schedule contract must be in effect for an agency to order under a Schedule contract or BPA.

For additional information on BPAs, log on to [www.gsa.gov/bpa](http://www.gsa.gov/bpa).

## Training

For additional guidance and training on BPAs, visit the Center for Acquisition Excellence at <http://cae.gsa.gov>.



### NUTS AND BOLTS TIP

Additional clauses that are inconsistent with the terms and conditions of the GSA Schedule contract cannot be added to Schedule BPAs. However, special provisions that do not conflict with the terms and conditions of the Schedule contract may be added to an individual GSA Schedule BPA, such as organizational conflict of interest clauses, or key personnel. It is always wise to check with the GSA Contracting Officer to ensure that any additional agency added provisions do not conflict with the Schedule contract. If your BPA requirement increases or changes so significantly that it changes the scope of your existing BPA, you must consider establishing a new BPA.

## Section 10: Contractor Team Arrangements (CTA)

A Schedule Contractor Team Arrangement (CTA) is an arrangement between two or more Schedule contractors to work together to meet agency requirements. The CTA document is a written agreement between team members detailing the responsibilities of each team member. The CTA allows the contractor to meet the government agency needs by providing a total solution that combines the supplies and/or services from the team members' separate Schedule contracts. It permits contractors to complement each other's capabilities in order to compete for orders for which they may not independently qualify. A customer benefits from a CTA by buying a solution rather than making separate buys from various contractors.

### Benefits of CTAs

- ❖ Satisfies the customer with a single solution
- ❖ Increases competitive edge
- ❖ Increases market share
- ❖ Increases visibility
- ❖ Focuses on core capabilities
- ❖ Obtains complementary capabilities
- ❖ Integrates different skills
- ❖ Offers additional opportunities with customers
- ❖ Builds direct relationships with customers
- ❖ Maximizes use of one or more Schedule solutions
- ❖ Shares risks and rewards
- ❖ Allows more opportunities for small business and small disadvantaged businesses
- ❖ Reduces the number of items Schedule contractors need to carry on their Schedule contracts, thus reducing inventory and tracking costs

Do not confuse Schedule Contractor Team Arrangements (CTAs) and Prime Contractor/Subcontractor Arrangements.



### NUTS AND BOLTS TIP

Do not confuse Schedule Contractor Team Arrangements with the definition of contractor teaming arrangements found in FAR Subpart 9.6. None of the definitions (the partnership/joint venture, or the prime/sub relationship) outlined in FAR Subpart 9.6 apply to Schedule CTAs.

In prime/sub arrangements, the relationship is defined and controlled by the prime contractor, whereas in CTAs, the roles and responsibilities are defined by the team, as accepted by the government ordering activity. A schedule CTA member may utilize a subcontractor. The following chart summarizes key differences.

<b>Contractor Team Arrangement (CTA)</b>	<b>Prime Contractor/Subcontractor Arrangement</b>
Each team member must have a Schedule contract	Only the prime contractor must have a Schedule contract
Each team member is responsible for duties addressed in the CTA document. These duties fall within the scope of their individual Schedule contracts.	The prime contractor cannot delegate responsibility for performance to subcontractors. The prime contractor can provide only what is on its Schedule contract, it cannot subcontract to offer items/services for which it does not hold a Schedule contract.
Each team member has privity of contract with the government and can interact directly with the government	Only the prime contractor has privity of contract with the government and can interact with the government. The prime contractor is responsible for its subcontracting activities (ordering activities are permitted to specify in the RFQ that the use of subcontractors requires prior approval by the ordering activities).
The ordering activity is invoiced at each team member's unit prices or hourly rates as agreed in the task or delivery order or Schedule BPA	The ordering activity is invoiced in accordance with the prime contractor's Schedule contract
Total solutions, otherwise impossible under individual Schedule contracts, can be put together quickly and easily	The prime contractor is limited to the supplies and/or services awarded on its Schedule contract

A contractor holding multiple Schedule contracts may offer a solution that crosses those contracts. Such a solution would not be considered a CTA because there is only one contractor.

To ensure that the responses received from Request for Quotations (RFQ) are, in fact, CTAs, GSA strongly recommends that an ordering activity's RFQ indicate that all CTAs must be specifically identified as such and that the CTA document be submitted to the government as part of the quotation in response to the RFQ. Do not be confused, for example, by a "Team ABC" response; the response should clearly identify that the Schedule contractors are proposing a "Contractor Team Arrangement as evidenced by the CTA document." The CTA document should designate all team members, their corresponding Schedule contract numbers, and describe the tasks to be performed by each team member, along with the associated proposed prices (e.g., unit prices, labor categories and hourly rates). If applicable, the team lead should also be identified, as should the individual team members responsible for delivery, warranty and other issues. The ordering activity should then be

able to verify that any proposed unit prices or hourly rates do not exceed the prices awarded under each team member's Schedule contract and avoid any misunderstandings regarding each team member's responsibilities and prices.

Schedule contractors may establish a CTA in advance of any known requirement or after requirements are defined and the RFQ issued. Having an on-the-shelf team arrangement for non-complex buys will allow the contractors to respond quickly and easily when requirements emerge. For highly complex buys, a customized CTA may be required. In either case, the CTA document should include the names of the team members, their respective Schedule contract numbers, and a description of the responsibilities of each team member. Agencies should review CTA documents to ensure that the documents clearly delineate team member responsibilities and provide for coordination and cooperation between team members, thus diminishing the risk for all parties involved.

In providing a total solution to an agency's requirement under a CTA, the supplies and services (for services, the LABOR CATEGORIES under each Schedule contract need to be segregated) proposed should be identified under each team member's Schedule contract. Any proposed supplies and services that are not part of a Schedule contract (e.g., open market items) may be included only after all applicable acquisition regulations have been followed (refer to FAR 8.402(f)) and must be clearly labeled as such. GSA does not approve the CTA document. CTA documents are developed by the team members themselves and will vary from one CTA document to another. While not all-inclusive, GSA has developed elements of a Contractor Team Arrangement Document ([www.gsa.gov/cta](http://www.gsa.gov/cta)), which identifies areas that are typically of interest to the government. GSA strongly encourages the submission of the CTA document in response to a RFQ.

The CTA is solely between the team members and cannot conflict with the underlying terms and conditions of each team member's Schedule contract. As part of the ordering agency's review of quotations, however, ordering activities may identify deficiencies in the CTA in order to enhance the probability of successful performance. While the government is not a party to the CTA, it is a beneficiary of the arrangement and has a vested interest in the successful performance of the CTA.

## Invoicing

The CTA document should designate who is responsible for invoicing and payment. While the team lead may submit an invoice on behalf of all team members, GSA recommends that payment be made to each team member. GSA recognizes, however, that there may be instances where it is advantageous to craft the CTA document so that payment is made to the team lead who, in turn, pays each team member. Under such circumstances, the CTA document should clearly indicate that all team members agree to this payment arrangement. The CTA document should also acknowledge that any dispute involving the distribution of payment between the team lead and the team members will be resolved by the team members, without any involvement by the government.

## Problems/Issues

Since each team member in a Schedule CTA has a Schedule contract, each team member is held accountable under the terms and conditions of his contract for any problems such as warranty or performance issues. The CTA document should spell out which team member is responsible at each phase of the project. When evaluating team member performance, the ordering activity Contracting Officer should evaluate each team member accordingly. Disputes between CTA members involve them as parties to the CTA. The Government is not a party to such disputes.



## Fees/Charges

There could be a cost involved for contractors to participate in a Schedule Contractor Team Arrangement. The use of a CTA should not increase the price of the order to the government. The CTA document should spell out any costs associated with the arrangement and how they will be allocated among team members. The benefits of a CTA may more than compensate for a contractor's costs by expanding the firm's capabilities and broadening its customer base. Please keep in mind that each team member is governed by his own Schedule contract, and that the CTA price quotation cannot exceed the awarded unit prices or hourly rates under its Schedule contract.

## Pricing

Each team member's work should be priced in accordance with its own Schedule contract.

## Communication

The Teaming Agreement specifies communication in a CTA. Points of contacts should be spelled out in the CTA document for the team lead and for each member. In a CTA, the ordering activity communicates directly with the Schedule contractors. The parties may agree that all communication with the ordering activity will be through the Team Lead.

## Use of Subcontractors

Schedule team members may still use subcontractors as allowed by their GSA Schedule contracts and as may be addressed in the CTA. Those subcontractors, however, would not be considered members of the "team," and the responsibility for the subcontractors would rest with the applicable team member who employs them.

To obtain additional information on CTAs, register at the Center for Acquisition Excellence (<http://cae.gsa.gov>).

## Use of Blanket Purchase Agreements (BPAs)

CTAs can also be the basis for a Schedule BPA utilizing the underlying Schedule contracts of the CTA members. The Schedule BPA should address the details, arrangements or administration of the CTA. For additional information, visit the FAQ at [www.gsa.gov/cta](http://www.gsa.gov/cta).

# Section 11: eTools

---



## Center for Acquisition Excellence

The Center for Acquisition Excellence provides a state-of-the-art online training tool for Schedule users and businesses seeking to become Schedule partners.

The Center for Acquisition Excellence is designed as a virtual campus, including a map with links to buildings that house free training courses and knowledge resources normally found on a college campus. The Center for Acquisition Excellence consists of an Administration Building, Learning Center, Conference Center, Teaming Center and Coffee Shop. Additional features include Announcements, Ask the Expert, Surveys, Student Records and various other support functions.

In addition to online training, the Center for Acquisition Excellence provides the latest Schedules information, available free of charge, 24 hours a day, seven days a week. The Center for Acquisition Excellence offers:

- ❖ Expanded functionality
- ❖ In-depth courses, including quizzes
- ❖ Reference links
- ❖ Bulletin boards
- ❖ Course surveys for user feedback
- ❖ An “Ask the Expert” feature

[www.gsa.gov/CAE](http://www.gsa.gov/CAE)



## Schedules eLibrary

The Schedules eLibrary is the official online source for complete GSA and VA Schedules and contract award information as well as GWACs. It provides a centralized source for researching Schedules that includes basic ordering guidelines, complete Schedules listings and a powerful search engine.

Schedules eLibrary is available 24/7 and is updated daily to ensure access to the latest Schedules contract award information.

Customers can link to *GSA Advantage!*<sup>®</sup> and eBuy.

Search which suppliers have a contract and what's available by using various search options, e.g., Schedule contractor's name, contract number, SIN, Schedule number or keyword.

Key features of the Schedules eLibrary include:

- ❖ Access to information on millions of services and supplies
- ❖ The latest news about the Schedules program
- ❖ Direct link to the *GSA Advantage!*® online shopping
- ❖ An improved design for easier browsing and navigation
- ❖ New “preview” pages allowing users to jump directly to the areas needed without unnecessary paging
- ❖ The ability to download Schedules information by Schedule or SIN
- ❖ Access to contractor Web sites and e-mail addresses
- ❖ Ability to search by geographical location

[www.gsa.gov/elibrary](http://www.gsa.gov/elibrary)

### ***GSA Advantage!*®**

GSA offers an online shopping service *GSA Advantage!*® through which ordering activities may place orders against the Schedules. This online catalog, information and ordering system creates a direct customer-Schedule contractor relationship. It is designed to make the federal buying process more efficient by providing ordering activities the ability to search, identify, compare and order items that offer the best value (refer to FAR 2.101). However, for services that require an SOW, the ordering activity could create the order through eBuy ([www.gsa.gov/ebuy](http://www.gsa.gov/ebuy)), GSA's electronic request for quotes system.

By using *GSA Advantage!*®, ordering activities have access to millions of services and supplies — 24 hours a day, 365 days a year. Many supplies are available for delivery within a few days.

You can perform price reviews and comparisons, browse and park your shopping cart to finish orders at a later time.



*GSA Advantage!*® allows ordering agencies to:

- ❖ Search for items using keywords, part numbers, National Stock Numbers (NSNs), supplier names, contract numbers, etc.
- ❖ Compare features, prices and delivery options
- ❖ Configure supplies and add accessories
- ❖ Review delivery options
- ❖ Select a convenient payment method
- ❖ Place orders directly online
- ❖ View order history to track status, re-order or cancel

To shop *GSA Advantage!*® ordering activities will need either a governmentwide commercial purchase card or a GSA Activity Address Code (AAC).

An AAC may be obtained from GSA by clicking on the “Apply for an AAC” link on the sign-on screen.

To browse *GSA Advantage!*® use the “browse” option on the sign-on screen and enter the appropriate ZIP code. A governmentwide commercial purchase card or AAC is not necessary for browsing.

For additional information, a tutorial is available online and can be downloaded at [www.gsaadvantage.gov](http://www.gsaadvantage.gov).

## **Security**

*GSA Advantage!*® utilizes industry standard secure sockets layer (SSL) technology. SSL encrypts the transfer of information between the ordering activity's browser and our server.

## **Technical Problems**

Questions of a technical nature or related problems, or suggestions about how we may better serve you may be directed to [gsa.advantage@gsa.gov](mailto:gsa.advantage@gsa.gov).

## **Order Status Questions**

For shipping, transportation or billing discrepancies on NSN items, contact GSA's National Customer Service Center (NCSC) at (800) 488-3111 or click on “Discrepancy Report” found under the Customer Service portion for a pre-addressed form in *GSA Advantage!*®. You can also e-mail [rodsn.nscs@gsa.gov](mailto:rodsn.nscs@gsa.gov).

For order status, follow-ups, etc., you may contact the supplier directly. The Schedule contractor's name and telephone number are printed on the order summary received at checkout, and are also available through order history/status.

[www.gsaadvantage.gov](http://www.gsaadvantage.gov)

## **eBuy**

eBuy, GSA's electronic Request for Quotation (RFQ) system, is an online RFQ system that allows ordering activities to post requirements, obtain quotes and issue orders electronically.

eBuy streamlines the ordering process with point-and-click functionality by allowing RFQs and responses to be exchanged electronically between federal agencies and Schedule contractors. Ordering activities can maximize their buying power by leveraging the power of the Internet to increase Schedule contractor participation, and save money and time.

eBuy provides a transparent buying mechanism, allowing Schedule contractors greater opportunities to offer quotes and increase business volume for services and supplies provided under their Schedule contracts.

eBuy's Benefits to Ordering Activities include:

- ❖ eBuy allows ordering activities to maximize their buying power by leveraging the power of the Internet to obtain quotes that will result in a best value purchase decision
- ❖ eBuy provides ordering agencies with a great RFQ management tool that will result in saving time and money
- ❖ eBuy is interactive, allowing ordering agencies to communicate requirements and quotes via the Web and e-mail
- ❖ eBuy is efficient, streamlining the acquisition process
- ❖ eBuy fulfills the requirements of notification to all under Section 803
- ❖ eBuy is easy to use
- ❖ eBuy can be a key component of market research on potential schedule vendors through the use of its RFI functionality

For more information or assistance, contact GSA at [gsa.advantage@gsa.gov](mailto:gsa.advantage@gsa.gov).

### How does eBuy work?

When using the eBuy system, ordering activities simply prepare and post an RFQ (with or without an SOW) for specific services and supplies for a designated period of time. This is then available for review by all Schedule contractors awarded the identified SIN(s).

While an ordering activity may choose to notify a select population of Schedule contractors of their requirement (who receive an e-mail notice of the posting), it is available for review by all Schedule contractors awarded the identified SIN(s).

Schedule contractors not notified of the posting by e-mail may still submit a quote for any RFQ placed under their awarded SIN. Schedule contractors are encouraged to check the eBuy site daily for RFQ opportunities. Only Schedule contractors with electronic price lists loaded to GSA *Advantage!*® have access to eBuy and the opportunity to review and receive notifications of postings.

Schedule contractors post their proposals directly to eBuy. Once an RFQ has closed, the ordering activity may then evaluate and accept the quote that represents the best value. Access to this information is limited to the ordering activity. The ordering activity may then issue an order through e-Buy or off-line to any Schedule contractor whose quote was accepted.

[www.gsa.gov/ebuy](http://www.gsa.gov/ebuy)

### eOffer/eMod

eOffer/eMod is a Web based application that allows vendors to prepare and submit their GSA Schedule offers/Schedule contract modification requests electronically. eOffer/eMod uses the latest digital authentication technology to ensure the integrity of data and to electronically sign the offer (proposal) or modification request. Digital certificates are required in order to use eOffer/eMod.

## Benefits

eOffer/eMod improves the proposal or modification process by:

- ❖ Introducing an easy-to-use, progressive screen design for submitting a Schedule proposal
- ❖ Guiding users through each step of the solicitation and modification process
- ❖ Automating the submittal process by electronically transferring the completed proposal/modification request to the contracting office
- ❖ Electronically signing documents

## Customer Assistance

- ❖ Technical Problems: Vendors who have technical questions, are experiencing technical problems, or have suggestions about how GSA may better serve them may contact GSA by calling (866) 472-9114 or by sending an e-mail to [eooffer@gsa.gov](mailto:eooffer@gsa.gov)
- ❖ Contracting Issues: Vendors who have questions relating to the solicitation should contact the representative in the solicitation or their GSA contracting official

[www.gsa.gov/eoffer](http://www.gsa.gov/eoffer)



## Section 12: State and Local

---

### **Cooperative Purchasing Program Overview**

Section 211 of the E-Government Act of 2002 authorized GSA sales of Schedule 70 IT products and services to state and local governments through the introduction of Cooperative Purchasing. Cooperative Purchasing authorizes state and local government entities to purchase from Schedule 70 Information Technology (IT) contracts and Consolidated Schedule (formerly Corporate Contracts Schedule) with associated IT Special Item Numbers (SINs). Purchases may be made by all eligible state and local entities at any time for any reason. Participation in Cooperative Purchasing is voluntary for both Schedule contractors and state and local government entities.

[www.gsa.gov/cooperativepurchasing](http://www.gsa.gov/cooperativepurchasing)

### **Disaster Recovery Purchasing (Section 833) Program Overview**

Section 833 of the John Warner National Defense Authorization Act for Fiscal Year 2007 (Public Law 109-364) amends 40 U.S.C. 502 to authorize the Administrator of General Services to provide to state and local governments the use of GSA Multiple Award Schedules of the GSA for purchase of products and services to be used to facilitate recovery from a major disaster declared by the President under the Robert T. Stafford Disaster Relief and Emergency Assistance Act (42 U.S.C. 5121 et seq.) or to facilitate recovery from terrorism or nuclear, biological, chemical or radiological attack.

State and local governments that wish to use the GSA and VA Schedules to facilitate recovery from major disasters or attacks are responsible for ensuring that only authorized representatives of their governments place orders against these schedules and that procured products and services are used only for the purposes authorized by Section 833 of Public Law 109-364.

Use of GSA Schedules by state and local governments is voluntary. Agreement of a Schedule contractor to offer recovery purchasing under the contract and acceptance of any order for recovery purchasing from a state or local government is voluntary.

State and local governments may use the GSA Schedule contracts to purchase products or services in advance of a major disaster declared by the President under the Robert T. Stafford Disaster Relief and Emergency Assistance Act (42 U.S.C. 5121 et seq.) or terrorist, nuclear, biological, chemical or radiological attack. In the aftermath of emergency events, state or local governments' systems may be disrupted. Thus, use of GSA and VA Schedule contracts prior to these events to acquire products or services to be used to facilitate recovery is authorized. The state or local government will be responsible for ensuring that purchased products or services are to be used to facilitate recovery.

Additional information on the Robert T. Stafford Disaster Relief and Emergency Assistance Act is available at [www.fema.gov/about/stafact.shtm](http://www.fema.gov/about/stafact.shtm).

[www.gsa.gov/disasterrecovery](http://www.gsa.gov/disasterrecovery)

## Cooperative Purchasing and Disaster Recovery Purchasing Information

### Program Use

As a condition of using these Schedule contracts, eligible ordering activities agree to abide by all terms and conditions of the GSA Schedule contract, with the exception of those terms and conditions identified below under “Contract Formation.” Eligible ordering activities may include terms and conditions required by statute, ordinance, regulation or order to the extent that these terms and conditions do not conflict with Schedule contract terms and conditions.



Schedule contractors must decline orders within five days of receipt or the order is considered accepted.

### Definitions

The General Services Administration Acquisition Manual (GSAM), Part 538.7001, Definitions, offers the following definition of state and local governments:

“The States of the United States, counties, municipalities, cities, towns, townships, tribal governments, public authorities (including public or Indian housing agencies under the United States Housing Act of 1937), school districts, colleges and other institutions of higher education, council of governments (incorporated or not), regional or interstate government entities, or any agency or instrumentality of the preceding entities (including any local educational agency or institution of higher education) and including legislative and judicial departments.”

The term does not include contractors, or grantees of state or local governments.

The COOP PURC icon  and DISAST RECOV icon  in both Schedules eLibrary and GSA Advantage!® indicates that authorized state and local government entities may purchase items from these contracts.

### Payment by Credit Card

Contractors must accept any credit card used by state or local government entities to pay for purchases up to the micro-purchase threshold.

### Ordering Procedures

State and local government entities are encouraged to use existing Schedule ordering procedures (refer to FAR 8.4), unless they are bound by procurement regulations under which they operate. State and local preference programs are not waived or otherwise affected by these regulations. Refer to Ordering Procedures on Page 14.

### Contract Formation

Whenever a Schedule contractor accepts an order from a state or local government, a new contract is formed.

The terms and conditions of the underlying Schedule contract will be incorporated, by reference, into the new contract between the state or local government and the Schedule contractor.

The following clauses are excluded from Cooperative Purchasing orders: the disputes clause, the patent indemnity clause, and the portion of the Commercial Item Contract Terms and Conditions that specifies “compliance with laws unique to government contracts” (which applies only to contracts with the Executive Branch of the U.S. government).

## **Payment**

The terms and conditions of a state’s prompt payment law apply to orders placed by eligible non-federal ordering activities. If the ordering activity is not subject to a state prompt payment law, the Federal Prompt Payment Act will cover the activity in the same manner as federal ordering activity.

## **Disputes**

The federal government will not be liable for the performance or nonperformance of contracts established between Schedule contractors and state or local government entities. Disputes may be litigated between the state or local entity and the Schedule contractor in any state or federal court with jurisdiction over the parties, using the principles of federal procurement law and the Uniform Commercial Code, as applicable and appropriate.

## **1122 “Counterdrug” Program**

Section 1122 of the Fiscal Year 1994 National Defense Authorization Act established the authority for state and local governments to purchase law enforcement equipment through federal procurement channels, provided that the equipment is used in the performance of counter drug activities. The authority for the “1122 Program” resides with the Department of Defense. The U.S. Army, as the Executive Agent of the program, has formed a steering committee consisting of representatives from the General Services Administration (GSA), the Defense Logistics Agency (DLA), and the Department of Justice (DOJ). Under the provisions of the statute, GSA is responsible for the development of a catalog, which not only explains the 1122 Program, but also delineates those products that may be procured under the program.

Each state participating in the 1122 Program designates a State Point of Contact (SPOC) to administer the state’s activities under the program, by validating the counter drug mission of each procurement request and ensuring the availability of funds.

With the approval of the Executive Agent, GSA has approved certain equipment included in GSA Schedules and the purchase of motor vehicles under the program. The SPOCs are responsible for receiving all orders from state and local law enforcement entities, and for determining that the items will be used for counter drug activities. For items under Schedules, the SPOCs will send all orders directly to the Schedule contractor, payment will also be made directly to the Schedule contractor. Orders for the purchase of vehicles (except for the Command Centers on 23 V, which can either be placed directly with the contractor or forwarded to GSA) must be forwarded by the SPOC through GSA. The 1122 Program is non-mandatory to both the SPOCs and the Schedule contractors, e.g., the contractors have the option as to whether to accept or reject an order from the SPOC.

[www.gsa.gov/1122program](http://www.gsa.gov/1122program)

## Section 13: GSA Schedule Listing

Schedule Titles and Numbers	
	Schedule Title
541	ADVERTISING & INTEGRATED MARKETING SOLUTIONS (AIMS)
56	BUILDINGS AND BUILDING MATERIALS/INDUSTRIAL SERVICES AND SUPPLIES
66 III	CLINICAL ANALYZERS, LABORATORY, COST-PER-TEST
71 II K	COMPREHENSIVE FURNITURE MANAGEMENT SERVICES (CFMS)
00CORP	CONSOLIDATED SCHEDULE (formerly Corporate Contracts Schedule)
65 II C	DENTAL EQUIPMENT AND SUPPLIES
899	ENVIRONMENTAL SERVICES
03FAC	FACILITIES MAINTENANCE AND MANAGEMENT
520	FINANCIAL AND BUSINESS SOLUTIONS (FABS)
72 I A	FLOOR COVERINGS
73	FOOD SERVICE, HOSPITALITY, CLEANING EQUIPMENT AND SUPPLIES, CHEMICALS AND SERVICES
72 II	FURNISHINGS
70	GENERAL PURPOSE COMMERCIAL INFORMATION TECHNOLOGY EQUIPMENT, SOFTWARE AND SERVICES
51 V	HARDWARE SUPERSTORE
71 II	HOUSEHOLD AND QUARTERS FURNITURE
738 X	HUMAN RESOURCES & EQUAL EMPLOYMENT OPPORTUNITY SERVICES
65 VII	INVITRO DIAGNOSTICS, REAGENTS, TEST KITS AND TEST SETS
738 II	LANGUAGE SERVICES
751	LEASING OF AUTOMOBILES AND LIGHT TRUCKS
874 V	LOGISTICS WORLDWIDE (LOGWORLD)
65 II A	MEDICAL EQUIPMENT AND SUPPLIES
621 II	MEDICAL LABORATORY TESTING AND ANALYSIS SERVICES
71 III E	MISCELLANEOUS FURNITURE
874	MISSION ORIENTED BUSINESS INTEGRATED SERVICES (MOBIS)
00JWOD	NIB/NISH PRODUCTS
71 I	OFFICE FURNITURE
75	OFFICE PRODUCTS/SUPPLIES AND SERVICES AND NEW PRODUCTS/TECHNOLOGY
71 II H	PACKAGED FURNITURE
65 II F	PATIENT MOBILITY DEVICES
65 I B	PHARMACEUTICALS AND DRUGS
67	PHOTOGRAPHIC EQUIPMENT — CAMERAS, PHOTOGRAPHIC PRINTERS AND RELATED SUPPLIES & SERVICES (DIGITAL AND FILM-BASED)
621 I	PROFESSIONAL AND ALLIED HEALTHCARE STAFFING SERVICES
58 I	PROFESSIONAL AUDIO/VIDEO, TELECOMMUNICATIONS AND SECURITY SOLUTIONS
871	PROFESSIONAL ENGINEERING SERVICES
76	PUBLICATION MEDIA
66	SCIENTIFIC EQUIPMENT AND SERVICES
81 I B	SHIPPING, PACKAGING AND PACKING SUPPLIES



<b>71 III</b>	SPECIAL USE FURNITURE
<b>78</b>	SPORTS, PROMOTIONAL, OUTDOOR, RECREATION, TROPHIES AND SIGNS (SPORTS)
<b>736</b>	TEMPORARY ADMINISTRATIVE AND PROFESSIONAL STAFFING (TAPS)
<b>36</b>	THE OFFICE, IMAGING AND DOCUMENT SOLUTION
<b>26 I</b>	TIRES, PNEUMATIC (NEW), FOR PASSENGER, LIGHT TRUCK, MEDIUM TRUCK AND BUS AND RETREAD SERVICES
<b>84</b>	TOTAL SOLUTIONS FOR LAW ENFORCEMENT, SECURITY, FACILITIES MANAGEMENT, FIRE, RESCUE, CLOTHING, MARINE CRAFT AND EMERGENCY/ DISASTER RESPONSE
<b>69</b>	TRAINING AIDS & DEVICES, INSTRUCTOR-LED TRAINING; COURSE DEVELOPMENT; TEST ADMINISTRATION
<b>48</b>	TRANSPORTATION, DELIVERY AND RELOCATION SOLUTIONS
<b>599</b>	TRAVEL SERVICES SOLUTIONS
<b>23 V</b>	VEHICULAR MULTIPLE AWARD SCHEDULE (VMAS)
<b>65 V A</b>	X-RAY EQUIPMENT AND SUPPLIES

### Consolidated Schedule (formerly Corporate Contracts)

The Consolidated Schedule adds value by simultaneously reducing administrative costs, shortening lead times and ensuring quality services and related supplies. This Schedule covers a broad spectrum of services for various functional domains, including engineering, information technology, logistics and management/organizational business improvement services.

This Schedule is a tool for federal agencies to issue task orders to a single company to perform a requirement that includes services falling within the scope of several individual Schedules.

#### The Consolidated Schedule:

- ❖ Improves purchase decision-making
- ❖ Reduces risk by acting as a single entry
- ❖ Allows leveraging through volume buying

This contracting tool also provides ordering activities with the ability to control and manage their entire requirement. Using the Consolidated Schedule is an ideal solution to fulfill an agency's professional services needs.

[www.gsa.gov/consolidated](http://www.gsa.gov/consolidated)

## Section 14: Customer Assistance

---

Ordering activity customers needing additional information or assistance on the various services, supplies and programs may contact:

### **National Customer Service Center (NCSC)**

Customers are encouraged to call GSA's National Customer Service Center (NCSC) at (800) 488-3111 or DSN 465-1416 between 7 a.m. to 6 p.m. (Central Time) with general or specific questions about GSA. The NCSC's customer service representatives are knowledgeable about GSA's business lines and their associated products and services and will direct you to a source that will best address your needs. The NCSC can also help verify your order's status, track shipments, resolve order discrepancies or deficiencies, and provide information on merchandise returns and exchanges, as well as address billing inquiries, merchandise quality concerns, and current price quotes.

#### **Customer Assistance**

Telephone: (800) 488-3111

E-mail: [NCSCcustomer.service@gsa.gov](mailto:NCSCcustomer.service@gsa.gov)

[www.gsa.gov/ncsc](http://www.gsa.gov/ncsc)

### **Problem Resolution**

Report a problem with any order by using eResolve, an online customer service solution. eResolve allows direct reporting of problems with a requisition or GSA Global Supply order shipment. Thus, correcting problems such as damage, short/over, wrong item, quality, tracking shipments and merchandise returns is quick and easy.

[www.gsa.gov/eresolve](http://www.gsa.gov/eresolve)

### **Centralized Mailing List Service (CMLS)**

For your convenience, GSA offers a Centralized Mailing List Service that maintains copies of various GSA publications, including product catalogs, Schedules, fact sheets and more. Just let us know which publications you're interested in and we will mail them to you free of charge.

#### **Customer Assistance**

Telephone: (817) 334-5215

E-mail: [cmls@gsa.gov](mailto:cmls@gsa.gov)

[www.gsa.gov/cmls](http://www.gsa.gov/cmls)

## Headquarters FAS Business Portfolio Contacts

### Assisted Acquisition Services (AAS)

GSA's Office of Assisted Acquisition Services provides technical, acquisition, financial, and project management services to help federal customers purchase and deploy information technology and professional services solutions.

#### Customer Assistance

Telephone: (703) 306-6633

[www.gsa.gov/aas](http://www.gsa.gov/aas)

### General Supplies and Services (GSS)

GSA's Office of General Supplies and Services offers a wide selection of quality products ranging from construction equipment to furniture, information technology and office supplies. The portfolio consists of the following three business lines: Acquisition Operations, Supply Operations and Personal Property Management.

#### Customer Assistance

Telephone: (703) 605-5515

[www.gsa.gov/gss](http://www.gsa.gov/gss)

### Information Technology Services (ITS)

The Office of Integrated Technology Services integrates GSA's information technology and telecommunications initiatives under a single business portfolio.

[www.gsa.gov/its](http://www.gsa.gov/its)

#### Center for IT Schedule Program

Telephone: (703) 605-2700

[www.gsa.gov/itcenter](http://www.gsa.gov/itcenter)

#### Network Services

[www.gsa.gov/network](http://www.gsa.gov/network)

### Travel, Motor Vehicle and Card Services (TMVCS)

GSA's Office of Travel, Motor Vehicle, Card Services provides compliant, responsive and cost-effective services to aid federal customers in shipping, hauling and transporting the people and products essential to doing the business of government.

#### Customer Assistance

GSA Automotive

Telephone: (703) 605-2277 (CARS)

E-mail: [vehicle.buying@gsa.gov](mailto:vehicle.buying@gsa.gov)

[www.gsa.gov/automotive](http://www.gsa.gov/automotive)

GSA Fleet

E-mail: [gsa.fleet@gsa.gov](mailto:gsa.fleet@gsa.gov)

[www.gsa.gov/gsafleet](http://www.gsa.gov/gsafleet)

Travel and Transportation  
Telephone: (703) 605-5618  
E-mail: [transportation.program@gsa.gov](mailto:transportation.program@gsa.gov)  
[www.gsa.gov/travel](http://www.gsa.gov/travel)  
[www.gsa.gov/transportation](http://www.gsa.gov/transportation)

GSA SmartPay® Card Services  
Telephone: (703) 605-2825  
[www.gsa.gov/smartpay](http://www.gsa.gov/smartpay)

eTravel  
Telephone: (703) 872-8535  
E-mail: [eGovTravel@gsa.gov](mailto:eGovTravel@gsa.gov)  
[www.gsa.gov/etravel](http://www.gsa.gov/etravel)

## **Acquisition Centers**

### **Center for Facilities Maintenance and Hardware (CFMH)**

The GSA Center for Facilities Maintenance and Hardware provides a variety of quality products such as hardware, tools, appliances, lawn and garden equipment, metalworking and woodworking machinery, paints, sealants and adhesives to government customers around the world. These products can be purchased, leased or rented to provide a short-term or long-term solution to the federal community. The CFMH also provides facilities maintenance, facilities management, and energy management services providing a total solution for maintaining or managing federal buildings while emphasizing energy savings.

#### **Customer Assistance**

Telephone: (816) 926-6760  
E-mail: [hssmarketing@gsa.gov](mailto:hssmarketing@gsa.gov)  
[www.gsa.gov/cfmh](http://www.gsa.gov/cfmh)

### **Greater Southwest Acquisition Center**

GSA's Greater Southwest Acquisition Center provides a variety of diverse products and services, including power distribution equipment, food service equipment, janitorial and cleaning supplies, law enforcement and security equipment, forklifts and prefabricated buildings.

#### **Customer Assistance**

Telephone: (817) 574-2660  
E-mail: [marketing.gps@gsa.gov](mailto:marketing.gps@gsa.gov)  
[www.gsa.gov/generalproducts](http://www.gsa.gov/generalproducts)

## **IT Acquisition Center**

GSA's IT Acquisition Center is dedicated to providing government managers with smarter solutions to meet today's challenges of multiple priorities, increased demands and diminishing resources. GSA has established vital information technology (IT) products and services contracts with industry leaders, which can be easily accessed through the Multiple Award Schedules. Schedule 70 provides contracts with firms of all sizes, as well as nationally recognized leaders in their fields.

### **Customer Assistance**

Telephone: (703) 605-9300

E-mail: [IT.Center@gsa.gov](mailto:IT.Center@gsa.gov)

[www.gsa.gov/itcenter](http://www.gsa.gov/itcenter)

## **Management Services Center (MSC)**

The Management Services Center manages Multiple Award Schedule contracts focused on professional services related to business improvement, language interpretation and translation, environmental issues, logistics, engineering and consolidated services. The Management Services Center has contracted with small businesses, as well as nationally recognized leaders in their fields.

### **Customer Assistance**

Telephone: (800) 241-7246

E-mail: [mgmt.services@gsa.gov](mailto:mgmt.services@gsa.gov)

[www.gsa.gov/mgmtservices](http://www.gsa.gov/mgmtservices)

## **National Furniture Center**

GSA's National Furniture Center provides industry knowledge and contracting expertise for furniture and furnishings products and services, mail management, audio/visual, telecommunications and security solutions, as well as sports and recreation equipment, trophies and signs.

### **Customer Assistance**

Telephone: (703) 605-9300

[www.gsa.gov/furniture](http://www.gsa.gov/furniture)

## **Office Supplies and Administrative Services Center (OSAS)**

GSA's Office Supplies and Administrative Services Center supports civilian and military agencies with products and services to meet their office needs. In addition to providing a wide range of office supplies, the office offers training, human resources and Equal Employment Opportunities (EEO) services.

### **Customer Assistance**

Telephone: (212) 264-0868

E-mail: [smartshop@gsa.gov](mailto:smartshop@gsa.gov)

[www.gsa.gov/osas](http://www.gsa.gov/osas)

## **Center for Services Acquisition**

The Center for Services Acquisition provides professional services in the areas of finance and business to federal agencies, as well as Emergency Contracting and Strategic Sourcing Initiatives. GSA's procurement professionals design and implement Schedules that provide federal customers with direct access to industry experts. In addition to negotiating contracts under the Schedules program, the Center for Services Acquisition oversees the government's charge card program, GSA SmartPay®. We establish contracts with small business and 8(a) firms, as well as nationally recognized leaders in their fields, to help customers achieve their goals.

### **Customer Assistance**

Telephone: (703) 605-2774

E-mail: [fss.services@gsa.gov](mailto:fss.services@gsa.gov)

[www.gsa.gov/servicesacquisitioncenter](http://www.gsa.gov/servicesacquisitioncenter)

## **Governmentwide Acquisition Contract (GWAC) Centers**

GSA supports three GWAC centers located throughout the United States.

[www.gsa.gov/gwacs](http://www.gsa.gov/gwacs)

### **Enterprise GWAC Center**

The Enterprise GWAC Center offers efficient, responsive and professional support for all Information Technology (IT) acquisition needs by awarding and managing contracts that address the entire spectrum of IT, such as ANSWER (Applications' n Support for Widely-diverse End User Requirements), ACES (Access Certificates for Electronic Services), Alliant, ITOP II (IT Omnibus Procurement II), Millennia and Virtual Data Center Services.

### **Customer Assistance**

Telephone: (877) 534-2208

E-mail: [it.center@gsa.gov](mailto:it.center@gsa.gov)

[www.gsa.gov/egc](http://www.gsa.gov/egc)

### **Small Business GWAC Center**

The Small Business GWAC Center manages a diversified portfolio of 8(a), Historically Underutilized Business Zone (HUBZone) and Service-Disabled Veteran-Owned (SDVO) small business set-aside contracts for information technology solutions. These contracts are pre-competed, multiple award contracts with high-quality, small business industry partners. These small business firms specialize in providing innovative, information technology solutions to federal agencies worldwide. The Small Business GWAC Center manages three major small business set-aside contract vehicles: 8(a) STARS, HUBZone and VETS GWACs. In addition, efforts are underway to award a new GWAC (the Alliant Small Business GWAC).

### **Customer Assistance**

Telephone: (877) 327-8732

E-mail: [8a@gsa.gov](mailto:8a@gsa.gov)

[www.gsa.gov/sbgwac](http://www.gsa.gov/sbgwac)

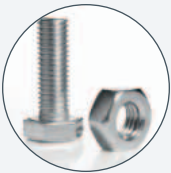
# Section 15: Additional GSA Acquisition Solutions

---

## GSA Global Supply

GSA Global Supply provides easy and flexible requisition-based ordering for office supplies, computer products, tools and safety and cleaning products.

To view all of the product offerings with the most current pricing, visit our ordering site at [www.GSAGlobalsupply.gsa.gov](http://www.GSAGlobalsupply.gsa.gov) or contact Global Supply's knowledgeable customer service representatives for more information at (800) 525-8027.



### NUTS AND BOLTS TIP

FAR 8.4 is not applicable to orders placed through GSA Global Supply. Customers do not need to solicit multiple bids because GSA Global Supply items have already been competed.

## Benefits of Ordering Through GSA Global Supply:

GSA Global Supply provides quality products backed by our service guarantees:

- ❖ Global delivery
- ❖ Product breadth and depth
- ❖ AbilityOne guaranteed products
- ❖ Easy compliance with the FAR
- ❖ Payment using government purchase card or AAC/DoDAAC
- ❖ Government-to-government transactions
- ❖ Requisition based ordering with no need for comparison shopping
- ❖ No spending limits

## After the Order

To request assistance or to resolve any billing or shipping questions, choose the “customer service” option after dialing (800) 525-8027, or visit [www.gsa.gov/eresolve](http://www.gsa.gov/eresolve).

## Catalogs

Customers may order a GSA Global Supply catalog by visiting [www.gsa.gov/cmls](http://www.gsa.gov/cmls), calling (817) 334-5215 or e-mailing [cmls@gsa.gov](mailto:cmls@gsa.gov).

## Customer Assistance

Telephone: (800) 527-8027

Option 1 – AAC or credit card orders

Option 2 – Customer support issues

Option 3 – FEDSTRIP/MILSTRIP orders

E-mail: [cmls@gsa.gov](mailto:cmls@gsa.gov)

[www.GSAGlobalsupply.gsa.gov](http://www.GSAGlobalsupply.gsa.gov)

## Governmentwide Acquisition Contracts (GWACs)

Hardware, software and services may be purchased through the Governmentwide Acquisition Contracts (GWACs) as part of a total technology solution. Task orders placed against GWACs may be customized to meet the full range of IT services solutions including, but not limited to service and product integration, systems integration, systems operation and management, software engineering management, communications, information systems engineering, information system security services, network and management telecommunications, and Web-enabled solutions.

[www.gsa.gov/gwacs](http://www.gsa.gov/gwacs)

**8(a) STARS (Streamlined Technology Acquisition Resources for Services)** provides a full range of IT solutions — including application development, computer facilities management services and information assurance — through small disadvantaged 8(a) firms.

As an 8(a) set-aside, this contract vehicle provides small businesses historically left out of the procurement process with a chance to compete in the federal marketplace. GSA customers benefit by having access to a portfolio of more than 400 award-winning industry partners distributed across eight areas of expertise. Federal agencies also receive 8(a) and other small business credits toward their procurement preference goals through the use of these contracts.

[www.gsa.gov/8astars](http://www.gsa.gov/8astars)

**Alliant (PENDING AWARD)** will provide the greatest amount of flexibility possible to efficiently and effectively support the federal government's needs in its daily operations, its protection of infrastructure, the fight against terrorism and the development and marketing of emerging technologies. Contracts awarded under Alliant will have 10-year contract periods (five-year base and one five-year option) to provide integrated IT solutions.

[www.gsa.gov/alliant](http://www.gsa.gov/alliant)

**Alliant SB (PENDING AWARD)**, a small business set-aside GWAC, is designed to provide worldwide information technology solutions to federal agencies, while strengthening federal contracting opportunities for small business concerns. Alliant SB will assist agencies in reaching their procurement preference goals, while providing small business concerns with opportunities to develop their businesses before moving into unrestricted acquisition environments.

[www.gsa.gov/sballiant](http://www.gsa.gov/sballiant)

**ANSWER (Applications 'n Support for Widely-Diverse End User Requirements)** delivers best value and innovation for such diverse projects as telemedicine, war gaming, agriculture, homeland security, nuclear energy and social security systems. ANSWER constantly updates technology offerings with a technical refreshment provision.

Features of the ANSWER GWAC include seven geographical rate areas with ceiling prices reflecting locations; 40 hours of training for every contractor full-time equivalent; and one group manager for every 35 contractor employees.

[www.gsa.gov/answer](http://www.gsa.gov/answer)

**COMMITTS NexGen** is a Government-Wide Acquisition Contract (GWAC) designed to offer information technology (IT) solutions to Federal customers. COMMITTS NexGen is designed to deliver top-quality, performance-based IT services and solutions that meet government mission requirements using a streamlined acquisition methodology. COMMITTS NexGen provides customers with competitive IT solutions from a pool of exceptional small businesses including disadvantaged, 8(a), women-owned, veteran-owned, service-disabled veteran-owned, and HUBZone businesses.

[www.gsa.gov/commits](http://www.gsa.gov/commits)

**Millennia** fulfills the demand for large system integration and development projects by providing IT support contracts in the areas of software engineering, communications and systems integration.

[www.gsa.gov/millenia](http://www.gsa.gov/millenia)

**Millennia Lite** is strategically segmented into four functional areas based on the life cycle of information technology: IT capital planning, studies and assessments; high-end information technology services; mission support services; and legacy systems migration and new enterprise systems development.

Typical projects under the Millennia Lite GWAC include, but are not limited to: biometrics; nanotechnology; capital planning and investment control; information assurance and security; critical infrastructure protection; knowledge management; systems engineering; application development; software development, Computer Aided Design, Engineering and Management (CAD, CAE, and CAM); and business and systems analysis.

[www.gsa.gov/millennialite](http://www.gsa.gov/millennialite)

**VETS (Veterans Technology Services)**, a service-disabled veteran-owned small business set-aside GWAC, is designed to provide worldwide information technology solutions to federal agencies, while strengthening federal contracting opportunities for service-disabled veteran-owned small business concerns. The VETS GWAC will assist agencies in meeting their 3 percent service-disabled veteran-owned small business goals by providing pre-qualified industry partners with a single easy-to-use contract vehicle. Service-disabled veteran-owned small businesses will, in turn, be provided with opportunities to compete amongst a smaller group of contract holders, allowing self-marketing opportunities and a chance to develop their businesses before moving into larger acquisition environments.

[www.gsa.gov/vetsgwac](http://www.gsa.gov/vetsgwac)

## **Network Services Programs**

GSA's Network Services help customers acquire telecommunications and network services. They provide a wide range of domestic and international network solutions at competitive prices while offering superior customer service. With pre-competed, full service contracts that are in-place and ready to use, network Services deliver the best value and innovation to meet your mission requirements and operational needs. These solutions include voice, video, and data services in both fixed and mobile environments. In addition, they offer a full range of managed network solutions as well as specific design and engineering services. This network is also responsible for managing current programs including Networx, FTS2001, metropolitan Area Acquisition, CONNECTIONS, and SATCOM-II contracts.

[www.gsa.gov/network](http://www.gsa.gov/network)

Awarded in January 2003, **CONNECTIONS** is an eight-year (3 base years + 5 one-year options) governmentwide, multiple award, and indefinite-delivery indefinite-quantity contracts. It's a one-stop shop for any office building, campus or base environment to deliver any level of demand for equipment (e.g. Routers, Switches), support services (e.g. Project Managers, Web Architects), or customized solutions (e.g. Systems Integration, Operations Support). More than half the awardees are small businesses.

[www.gsa.gov/connections](http://www.gsa.gov/connections)

**Federal Relay Service (FRS)** is a federal government service, which enables federal employees who are deaf, hard-of-hearing, deaf/blind, or have speech disabilities equal communication access. Using FRS, federal employees may conduct official duties. The FRS also allows the general public to conduct business with the federal government and its agencies. Calls are relayed using specially trained Communications Assistants (CA). The CA simply acts as a transparent conduit for the transmittal of information. The FRS is accessible domestically (50 states as well as Puerto Rico, the Virgin Islands, Guam, and the District of Columbia) 24 hours a day, 7 days a week, 365 days a year (including federal holidays). There are no restrictions on the number, length, or type of calls.

[www.gsa.gov/frs](http://www.gsa.gov/frs)

**Networx Program** provides comprehensive, best value telecommunications and networking services and technical solutions to all federal agencies. The Networx program serves as the primary replacement for the expiring FTS2001 and FTS2001 Crossover contracts and federal wireless contracts. Networx is designed to support a governmentwide enterprise architecture. It provides a framework that supports cross-agency collaboration, transformation, and governmentwide technology improvement. Networx maximizes the use of government resources by providing a common procurement infrastructure and a performance based approach that embraces commercial technical and interface standards. Networx requires that service providers offer the most current security features and services to ensure a secure government operating environment. The Networx program consists of two acquisitions — Networx Universal and Networx Enterprise. Both Networx Universal and Networx Enterprise are broadly scoped acquisitions with a comprehensive suite of services. Networx includes current services as well as those that anticipate the future needs of customers.

[www.gsa.gov/networx](http://www.gsa.gov/networx)

**Satellite Services-II (SATCOM-II)** provides an expanded range of end-to-end satellite solutions for government agencies. SATCOM-II offers agency customers unique opportunities — a special small business set-aside component for satellite professional support services and an innovative way to stay ahead of the technology curve. The set-aside helps agencies better involve America's outstanding small businesses in serving citizens, and a new modification process keeps SATCOM-II current with new technologies and services as they become commercially available. SATCOM-II offers competitive pricing throughout the life of the contract, as well as flexible ordering and billing. SATCOM-II contracts are five-year multiple award IDIQ Fixed Price contracts.

[www.gsa.gov/satcom-II](http://www.gsa.gov/satcom-II)



U.S. General Services Administration

One Country. One Mission. One Source.



5-08-00265  
Summer 2008  
[www.gsa.gov](http://www.gsa.gov)

September 2009 Comments and Updates to the  
**Multiple Award Schedules Desk Reference**  
[Summer 2008 Edition, CMLS PDF version 5-08-00265]  
by  
Dave Clemens ([david.clemens@gsa.gov](mailto:david.clemens@gsa.gov), (253) 931-7313)  
Contracting Officer, GSA/FAS/R10/Management Services Center  
at  
"Services Ordering Solutions: Avoiding MAS Confusion"  
<http://blogs.gsa.gov/blogs/servicesordering.nsf>

(References are to **MAS Desk Reference** page numbers. For example, 8-1 is the first endnote for **MAS Desk Reference** page 8.)

2-1 The Table of Contents entry for Page 24 entitled "GSA Schedule Orders for *Services* that Exceed \$100,000" is incorrect. The DoD FSS ordering procedures in DFARS 208.4 no longer apply just to *services* over \$100,000 but are also applicable to Schedule *supply* requirements over \$100,000. The actual title shown on Page 24 is correct.

4-1 The FPASA of 1949 is codified at: 40 U.S.C. 251-260, 471-514.

4-2 "Eligibility to Use GSA Sources" is not found at the web page cited but is instead found at <http://www.gsa.gov/schedules-ordering> in the document ADM 4800.2E.

5-1 A GSA web page reference for FSS ordering by State and local governments is <http://www.gsa.gov/stateandlocal>. In addition, the information is outdated in that State and local governments can place orders for, in addition to IT Schedule 70 and the disaster recovery supplies and services mentioned on Page 5:

1. Supplies and services under Schedule 84. The Local Preparedness Acquisition Act (Pub. L. 110-248) was implemented as an interim rule effective September 19, 2008 (73 Fed.Reg. 54334) in GSAR Case 2008-G517.
2. Counterdrug law enforcement equipment under the 1122 program described at <http://www.gsa.gov/1122program>
3. Supplies and services under all Schedules in response to public health emergencies declared by the Secretary of Health and Human Services under section 319 of the Public Health Services Act.

8-1 In accordance with the FAR 8.002 priority lists for supplies and services, the GSA Multiple Award Schedules outrank open-market procurements and shall be used in preference to non-Schedule open-market acquisitions of lower rank.

8-2 Services Priority List. The name of the JWOD/NIB/NISH program ("Committee for Purchase...") implementation was changed to the **AbilityOne** Program by FAC 2005-27 effective 10/17/2008. See FAR 8.7.

9-1 Supplies Priority List. The name of the JWOD/NIB/NISH program ("Committee for Purchase...") implementation was changed to the **AbilityOne** Program by FAC 2005-27 effective 10/17/2008. See FAR 8.7.

9-2 Note that there are currently no mandatory Federal Supply Schedules.

9-3 The sentence “[s]hall not synopsise the requirement in FedBizOpps” now has an exception. Schedule orders (including orders issued under Schedule BPAs) funded in whole or in part by the American Recovery and Reinvestment Act of 2009 (Pub. L. 111-5) must be synopsized as described in FAR 8.404(e), 5.704, and 5.705.

10-1 A 27-minute audio podcast Episode 1 “Acquisition Planning for Schedule Services” covers the agency decision to use the Schedules for services. See: <http://blogs.gsa.gov/blogs/servicesordering.nsf/dx/audio-file-links?opendocument&comments>

10-2 A 50-minute audio podcast Episode 2 “Scope and Market Research for Task Orders assists agencies in deciding which Schedule/SIN is the best fit for their service requirement. See: <http://blogs.gsa.gov/blogs/servicesordering.nsf/dx/audio-file-links?opendocument&comments>

11-1 Additional information on what GSA does to award and administer a Schedule contract can be found in the 33-minute podcast Episode 6 “What Does GSA Do to Award/Administer the Schedule Contract?” at: <http://blogs.gsa.gov/blogs/servicesordering.nsf/dx/audio-file-links?opendocument&comments>

12-1 The reference for the statement that ordering agencies are not required to perform a responsibility determination when placing a task or delivery order under a GSA Schedule is *Advanced Technology Systems, Inc.*, B-296493.6, October 6, 2006. Ordering activities should evaluate past performance as part of their best-value evaluation and must check the Excluded Parties List System. The importance of checking EPLS at the order level was emphasized in GAO Report 09-174 *Excluded Parties List System: Suspended and Debarred Businesses and Individuals Improperly Receive Federal Funds* (February 2009) and in the February 26, 2009 GSA testimony before the House Committee on Oversight and Government Reform as follows:

GSA David Drabkin: <http://oversight.house.gov/documents/20090226122357.pdf>  
GSA Jim Williams: <http://oversight.house.gov/documents/20090226122015.pdf>

13-1 Throughout this publication “Schedules eLibrary” should be corrected to read “GSA eLibrary.”

14-1 Schedules shall not be used for:

- (1) Cost-type orders. Orders of the Cost Reimbursement type are not permissible commercial contract types in accordance with FAR 12.207. Orders may only be of the FFP, FP w/ EPA, T&M, or LH type.
- (2) Architect-engineer services meeting the FAR 36.601-4 definition. FAR 8.403(c).
- (3) Personal services. FAR 37.103(a)(3) and 40 U.S.C. 501.
- (4) Services for inherently governmental functions. FAR 7.5.
- (5) Bundled contracts unless compliance with all FAR bundling requirements is documented. FAR 8.404(c)(2).
- (6) Services or supplies available from a higher priority source. FAR 8.002.

(7) Non-commercial products or services. The Schedule contracts include only the clauses applicable to commercial (FAR 2.101, FAR 12) acquisitions.

(8) Advisory and assistance services unless the required D&F has been approved. FAR 37.204.

14-2 "Eligibility to Use GSA Sources" is not found at the web page cited but is instead found at <http://www.gsa.gov/schedules-ordering> in the document ADM 4800.2E.

16-1 [Under "Documentation" on the right side of the table] The determination to use a Time-and-Material/Labor Hour task order must satisfy the requirement of FAR 8.405-2(e)(7)(i) in addition to the differing D&F requirements at FAR 12.207(b) and 16.601(d). See GAO Report 09-579 *Minimal Compliance with New Safeguards for Time-and-Materials Contracts for Commercial Services and Safeguards Have Not Been Applied to GSA Schedules Program* (June 2009).

20-1 Regarding the eBay-posted Request for Information useful in market research, the content of the RFI is similar to that of the Sources Sought Notice posted at FedBizOpps for non-Schedule procurements. Additional information on RFI content can be found at:

<http://schedulesolutions.net/2009/03/11/what-is-a-request-for-information-rfi-posted-to-gsa-ebuy.aspx>

20-2 The reference to "FAR 8.505-6" is a typographical error and should instead read "FAR 8.405-6."

22-1 Note that the brief explanation of the basis of award is not a FAR Part 15 "debriefing." Nothing in FAR Part 15 applies to Schedule orders and BPAs. FAR 8.404(a). When an ordering agency conducts a Schedule procurement like a FAR Part 15 acquisition, it increases its obligations - - and its risk of a sustained protest where GAO will assess the agency's action as if FAR Part 15 applied to the procurement. See:

<http://blogs.gsa.gov/blogs/servicesordering.nsf/dx/no-part-15?opendocument&comments>

22-2 Regarding order administration, one post-award action required for Schedule orders exceeding the simplified acquisition threshold is the evaluation of contractor performance on the order. For those orders, the ordering activity is responsible for the PPIRS report card, as the GSA Schedule contract CO does not enter any performance information into PPIRS. FAR 8.406-7, FAR 42.1502(c). Also note that Schedule orders (including orders issued under Schedule BPAs) funded in whole or in part by the American Recovery and Reinvestment Act of 2009 (Pub. L. 111-5) must have award notices publicized as described in FAR 5.705.

22-3 Additional information on task order options and period of performance can be found at:

<http://blogs.gsa.gov/blogs/servicesordering.nsf/dx/order-options?opendocument&comments>

23-1 The current threshold for the Trade Agreements Acts is \$194,000 rather than the \$193,000 shown at the top of Page 23. Some Free Trade Agreements have particular thresholds that are lower than \$194,000. FAR 25.402.

24-1 Any reference to “Section 803” is incomplete and no longer useful with respect to DoD ordering. That reference to a section in a 2002 NDAA (Pub. L. 107-107) has since been superseded and expanded by DFARS 208.4 requirements.

24-2 The DAU continuous learning module CLC010 *Proper Use on Non-DoD Contracts* no longer exists. According to the DAU website, CLC030 *Essentials of Interagency Acquisitions* has replaced CLC010.

25-1 Regarding “written orders using agency-prescribed purchase order form” in the DoD context, that agency has already defined the forms to be used for Schedule orders. In accordance with DFARS PGI 208.406-1(1), DoD agencies use either the DD1155 or the SF1449 for their Schedule orders, depending on the dollar value of the Schedule order.

25-2 In addition, all DoD service acquisitions (including interagency acquisitions) of the T&M/LH type are required to have a Quality Assurance Surveillance Plan. USD AT&L Memorandum of July 14, 2008 (S. Assad), *Management of Contractor Performance Under Time and Material and Labor Hour Contracts for Services*.

25-3 A 1 hour 6-minute audio podcast Episode 4 “Ordering Procedures for Schedule Task Orders” covers ordering topics when an RFQ for services is used. See:

<http://blogs.gsa.gov/blogs/servicesordering.nsf/dx/audio-file-links?opendocument&comments>

27-1 The third bullet “Use oral discussions” is vague and potentially confusing. Oral discussions as opposed to non-verbal discussions? Oral quotes or oral presentations are permitted and may be a best practice as discussed on Pages 41-43 of this document. Because FAR Part 15 does not apply to Schedule orders and BPAs (FAR 8.404(a)), use of the term “discussions” is inappropriate in the Schedule order context. *Intelligent Decisions, Inc.*, B-274626.2, December 23, 1996; *Vion Corporation*, B-283804.2, January 24, 2000; *Avalon Integrated Servs. Corp.*, B-290185, July 1, 2002. For example, merely requesting a discount from Schedule contractors does not constitute “discussions.” *OPTIMUS Corporation*, B-400777, January 26, 2009.

28-1 More about adding non-conflicting clauses/provisions to RFQs can be found at:

<http://blogs.gsa.gov/blogs/servicesordering.nsf/dx/add-clauses-to-orders?opendocument&comments>

28-2 The best way to determine which clauses are already in the Schedule contracts is to follow the link from that Schedule at GSA eLibrary to the FedBizOpps-posted standing solicitation. Then browse (or word-search) the posted solicitation document in addition to the separately posted document including the clauses incorporated by reference.

28-3 The document addresses Economic Price Adjustments at the Schedule contract level but is silent on the relationship between that price escalation and any escalation occurring at the Schedule order level. For more on those issues, see:

<http://blogs.gsa.gov/blogs/servicesordering.nsf/dx/escalation-on-orders?opendocument&comments>

28-4 References for the last sentence on Page 28 regarding no socioeconomic credit for orders to 8(a) concerns can be found at:

<http://blogs.gsa.gov/blogs/servicesordering.nsf/dx/no-8a-credit?opendocument&comments>

29-1 References for the first sentence on Page 29 regarding no authority for setting aside Schedule orders can be found at:

<http://blogs.gsa.gov/blogs/servicesordering.nsf/dx/No-Set-Aside-for-Schedule-Orders?opendocument&comments>

29-2 For some opinions on a wide range of small business-Schedule issues, see the August 2009 publication from Acquisition Solutions, Inc., *Guide to Considering Small Businesses When Using Schedules* at:

<http://blogs.gsa.gov/blogs/servicesordering.nsf/dx/acq-sol-small-biz?opendocument&comments>

29-3 A Schedule contractor retains the Schedule CO-determined business size for the entire current five-year period of Schedule contract performance unless there is an intervening acquisition, merger, or novation to trigger Schedule contract size re-certification. This means that if a small business Schedule contractor increases its annual receipts (or number of employees), it does not “outgrow” its GSA CO-determined size for that five-year period without an acquisition, merger, or novation to trigger size recertification. 13 CFR 121.404, 71 FR 66434, 66444.

29-4 A 41-minute audio podcast Episode 5 “Socioeconomic Programs and Schedule Orders” small business issues important for Schedule task orders. See:

<http://blogs.gsa.gov/blogs/servicesordering.nsf/dx/audio-file-links?opendocument&comments>

31-1 Performance incentives are permitted when they are based upon factors other than cost. Additional information on permissible performance incentives on Schedule orders can be found at:

<http://blogs.gsa.gov/blogs/servicesordering.nsf/dx/performance-incentives?opendocument&comments>

37-1 A 47-minute audio podcast Episode 3 “The Request for Quotations” covers services RFQ and PWS. See:

<http://blogs.gsa.gov/blogs/servicesordering.nsf/dx/audio-file-links?opendocument&comments>

40-1 For service Schedules, authority for task order determination of any “Other Direct Costs” and “Indirect Costs” is granted by those referenced parts of the contract clause FAR 52.212-4 ALTERNATE 1 - - a filled-in clause that can be read in the FedBizOpps-posted standing solicitation for that Schedule.

41-1 The phrase “...within the purview *after* FAR 12...” should read “...within the purview *of* FAR 12...”

41-2 The Center for Acquisition Excellence can be accessed directly at <http://cae.gsa.gov> or indirectly through <http://www.gsa.gov/cae>

44-1 Schedule BPAs are not contracts for most FAR purposes. For more information, see:

<http://blogs.gsa.gov/blogs/servicesordering.nsf/dx/bpa-not-contract?opendocument&comments>

In addition, FAR SubPart 8.4 recognizes only two Schedule ordering mechanisms: Schedule orders and Schedule BPAs (against which Schedule orders are placed.) There is no FAR authority to award a Schedule order with an IDIQ provision for the purpose of establishing an IDIQ contract with Schedule holders. This fiction of creating a (master) IDIQ order against which other Schedule orders are placed purportedly under a Schedule contract (which is itself an IDIQ) has no basis in the FAR. Recurring Schedule requirements are met with Schedule BPAs as described in this section of the **Desk Reference**.

50-1 Options on BPAs may increase administrative workload with no clear advantages, as the BPA annual review must still be conducted as required by FAR 8.405-3(d). As BPAs are not funded, a five-year recurring requirement might more effectively be met by an optionless five-year BPA rather than a BPA with a base year and four option years. BPAs typically include liberal unilateral cancellation provisions. Before putting options on a BPA, consider whether they are truly necessary. Putting options both on the task orders and on the BPA are typically not a best practice.

54-1 [Regarding Fees/Charges] Team Leads manage their Team Members in the same way that Schedule Prime Contractors manage their subcontractors: by increasing the level of effort necessary for a task. For a Schedule LOE (T&M/LH) task order, this means that the Team Lead would use the labor categories awarded and reflect the increase LOE necessary for team management in the teamed quote. In any event, the costs of team leadership can be recouped in a CTA with consolidated invoicing and payment through the Team Lead. For example, the Team Lead invoices the ordering activity in accordance with the order but only passes along a portion (say 95%, five percent being retained for team management) to the Team Members as agreed with the team in their teaming agreement. Those internal pricing decisions are entirely matters of negotiation between the team members; GSA and the ordering activity are not involved. Ordering activities are not obligated to pay a separately-priced Team Management Fee on their teamed Schedule orders.

55-1 The Documents section of the Center for Acquisition Excellence course on Schedule ordering includes a detailed (but slightly outdated) GSA Schedule Order Checklist. A shorter September 2009 checklist (for services only) can be found at:

<http://blogs.gsa.gov/blogs/servicesordering.nsf/dx/references?opendocument&comments>

55-2 "Schedules eLibrary" should now be referred to throughout this document as "GSA eLibrary."

56-1 A better way to search contractor pricelists at GSA Advantage is through the Region 10 Advanced Search described at:

<http://blogs.gsa.gov/blogs/servicesordering.nsf/dx/r10-advanced-search?opendocument&comments>

60-1 State and local governments can also use the Schedules for:

(1) Supplies and services under Schedule 84. The Local Preparedness Acquisition Act (Pub. L. 110-248) was implemented as an interim rule effective September 19, 2008 (73 Fed.Reg. 54334) in GSAR Case 2008-G517.

(2) Supplies and services under all Schedules in response to public health emergencies declared by the Secretary of Health and Human Services under section 319 of the Public Health Services Act.

63-1 [For Schedule 520 FABS] Governmentwide commercial independent risk analysis BPAs relating to risk of potential misuse of sensitive data have been awarded by GSA for the use of all Federal agencies. While the use of these BPAs is not mandatory, OMB Memorandum M-08-10 of February 4, 2008 requires that "if an agency decides to acquire independent risk analysis services other than through the GSA BPAS, the agency shall send a notification to GSA, with a copy to the OMB E-Government Administrator, explaining how the proposed contract offers a better value to the agency." The notice is required at least 10 days prior to making a contract award for independent risk analysis services.

63-2 The title of Schedule 58 I is no longer the one shown on Page 63. The new title is "58 I: *Professional Audio/Visual, Telemetry/Tracking, Recording/Reproducing and Signal Data Solutions.*"

64-1 Schedule 69 no longer exists as a separate Schedule. The SINs have been incorporated into 874 MOBIS.